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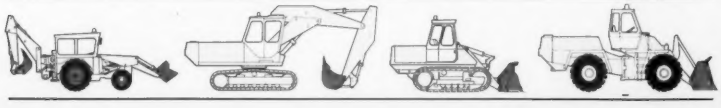

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Trade and Industry

24 June 1977

News from the Departments of Industry·Trade·Prices & Consumer Protection

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Trade and Industry this week

HOME

Borrie warns big multiples

Using his powers to deal with traders who persistently commit offences or break their civil obligations to customers, Director General of Fair Trading Gordon Borrie warned on Wednesday that he was taking a close look at the trading records of several very large multiple traders.

Addressing the annual conference of the Institute of Trading Standards Administration at Blackpool, Mr Borrie reported that the Office of Fair Trading had now obtained 50 written promises of better behaviour from traders who had been persistently breaking the criminal or civil law. In addition, requests for a further 36 assurances had been sent out.

Pointing out that he could only ask for an assurance if a trader or firm had persisted in a course of conduct unfair to consumers, he said that, where large firms were concerned, there were special factors to be considered. However well-managed a company might be, it was difficult for it to avoid the occasional conviction under, for example, the weights and measures acts or the Trade Descriptions Act.

'There are many variables attached to each situation we are looking at, and we must take them all into consideration,' he went on, 'When we ask for an assurance, we feel we must be on absolutely firm ground – because we may wish in due course to argue our case before the restrictive practices court.

In the course of the investigations, Mr Borrie said a great deal of very interesting – and sometimes rather surprising – information about national firms had been collected. 'Even if such investigations do not result in our seeking assurances from companies, it may nevertheless be useful – and I pitch it no higher than that – to bring some of this knowledge to the attention of managing directors who, I suspect, might be shocked to learn how their firms stand in the league table of big-time offenders. And I must make it clear that although what I have said has related to retail firms, we are also looking at, for instance, manufacturing industries – including the manufacture and distribution of food.'

Hotel charges restricted

An order restricting the charges that may be made by hoteliers in parts of south-west Scotland to the level of the normal tariff in force has been made by the Price Commission for the period 1 July to 10 July 1977.

The purpose of the order is to prevent enhanced charges being made merely because the open golf championship is being held and which would not otherwise be justifiable.

It does not prevent a hotelier increasing his charges if he can demonstrate that the increases are justifiable under the terms of the price code, for example because of increased costs. Nor does the order prevent normal seasonal increases being made if it has been customary for such increases to be made, they are made on the usual dates and they would have been made had the open golf championship not been held in the area.

The order is directed to all proprietors of hotels situated in the Kyle and Carrick and Cunninghame districts of the Strathclyde region and in the Wigtown district of the Dumfries and Galloway region, and applies to charges for the provision of food, drink and sleeping accommodation. It follows the publication of a notice by the commission on 16 May under section 6(4) of the Counter-Inflation Act 1973 which stated that it intended making an order restricting charges made by hoteliers in parts of south-west Scotland for the period 1 to 10 July 1977 and inviting written representations. The Commission has considered the representations received and has made the order under section 6(2) and (3) which takes account of certain points made in the representations.

New Price Commission chairman

Charles Williams, managing director of merchant bankers Baring Brothers, is to be the new chairman of the Price Commission.

Roy Hattersley, Secretary of State for Prices and Consumer Protection, announced the appointment on Monday in answer to a parliamentary question.

Mr Williams, 44, who joined Baring Brothers in 1970, is vice-chairman of the Labour Economic Finance and Taxation Association, a post he will relinquish on taking up his new appointment on 1 August, when the present chairman, Sir Arthur Cockfield, retires.

Also announced on Monday were the appointments of three deputy chairmen to the Price Commission – Dr G I Hobday, chairman of Boots; Mr J Hughes, vice-principal of Ruskin College; and Mr S Sweetman, vice-chairman of Unilever Ltd.

Two members of the present Price Commission have been reappointed to the commission – Professor Douglas Hague and Ian Davison.

Other members of the commission are to be appointed and will be announced shortly.

Under the Price Commission Bill, now before parliament, the Price Commission will be reconstituted and have new powers from 1 August.

Charles Williams, who is to be Price Commission chairman

The bill will give the commission stronger powers to stop price rises which it considers unnecessary and unjustified – including the power to recommend price freezes for up to 12 months – while being required to recognise the need for industry to earn sufficient profits for future investment and return on capital.

Protection against shoddy goods?

Minister of State for Prices and Consumer Protection, John Fraser, said on Tuesday that he was exploring, though not necessarily in the context of early legislation, the question of whether the consumer ought to be more adequately protected from pecuniary loss from shoddy goods.

In a speech to the annual conference of the Institute of Trading Standards Administration, Mr Fraser explained: 'I should emphasise that at this stage my thoughts are only tentative, but I would be interested to know what you think about this subject. It seems to me that we do have a duty to protect consumers from unacceptable shoddiness. Of course I accept that we all have a right to choose between different standards of quality for prices, but I am sure that there are standards below which even the cheapest products should not fall. Quality assurance has the particular advantage of improving performance, as some of the very successful voluntary schemes that there are around, show.'

A quality assurance scheme, he went on, could work in various ways: powers could be taken to ban sales of products that fell below a standard. Alternatively the manufacturer might be required to introduce some form of labelling, which either indicated the quality of a product (perhaps on a scale) or stated whether or not the product was of a certain standard.

Mr Fraser also mentioned a few preliminary thoughts he had had about the case for

some kind of general legislation creating the power to regulate the practices of trade and commercial activities where there was proven consumer detriment.

'I question whether we are right to continue to deal with these questions on an individual basis. Would it not be better to consider taking powers to regulate by subsidiary legislation any trade or activity which gives rise to consumer detriment – usually and indeed almost invariably by a small minority?'

Prime Minister backs anti-waste programme

Support for the new national anti-waste programme is given in a message issued on Wednesday by the Prime Minister, Jim Callaghan.

'"Save and recycle" means a lot for this country – a reduced import bill, conserved resources, a better environment and often it means more jobs', the Prime Minister said. 'That is why the government is giving its full backing to the national anti-waste programme (see page 570).

'Waste collections are not always easy to organise. But I am sure that the guide we have prepared provides the information and advice which will encourage more voluntary groups to start collecting.

'The key to recycling lies in developing co-operation between government, industry, local authorities, merchants, environmentalists, householders and organisations of all kinds. I am glad that co-operation is the keynote of the national anti-waste programme. If we all continue to work together the campaign will surely be a success'.

Air agreement in principle

Principles of a new air services agreement between the United States and the United Kingdom were agreed on Wednesday morning.

The new agreement will replace the 30-year-old Bermuda agreement which expired on Wednesday. Further details will be published in *Trade and Industry* next week.

Survey of channel shipping

Taking place this week (21 to 24 June) is the most comprehensive survey yet undertaken of the movement and composition of shipping in the English Channel. It is directed by the Anglo-French Safety of Navigation Group.

The possible information it will provide will assist in assessing the effects on channel shipping of the mandatory routeing provisions of the revised collision regulations, which come into force on 15 July, and whether any changes to the established traffic separation schemes in the area should be recommended to the inter-governmental maritime consultative organisation (IMCO), the United Nations agency responsible for their adoption.

The survey covers vessels both passing through and crossing the channel, from the Dover Strait to the western approaches with the Isle of Wight-Cherbourg corridor as mid-point. It is examining the use made by shipping of the existing traffic separation schemes in the Dover Strait, off the Casquets, Ushant, the Lizard and around the Scilly Isles. British and French naval and civilian aircraft, ships, helicopters and a hovercraft are co-operating in identifying vessels.

The results of the survey will be collated and analysed by the National Maritime Institute on behalf of the Department of Trade in co-operation with L'Institut de Recherche des Transports and reported to the Anglo-French Safety of Navigation Group.

Ekofisk blow-out post mortem

Stanley Clinton Davis, Parliamentary Under Secretary of State for Companies, Aviation and Shipping, flew to Oslo on 21 June for a meeting of North Sea oil states on the Ekofisk field blow-out.

The meeting, which was held on Wednesday discussed the lessons learned by the Norwegian government from the blow-out and reviewed safety arrangements by North Sea states on North Sea oil exploration and production and possible concerted action on oil pollution.

In addition to Mr Clinton Davis, the UK delegation to this meeting comprised Dr Dickson Mabon, Minister of State at the Department of Energy, and officials from the Departments of Trade, Energy and Environment.

Participants at the Oslo meeting included the eight North Sea states (Norway, Denmark, Germany, Netherlands, Belgium, France, Sweden and UK), and observers from Canada, Finland, Iceland, Ireland, the United States and the EEC.

OVERSEAS

France controls textile products

Import controls on four textile products from non-EEC countries have been imposed by the French government with effect from Wednesday (22 June).

Andre Rossi, French Minister for External Trade, announced during the weekend that under article 19 of the General Agreement on Tariffs and Trade (Gatt) men's shirts, women's blouses, T-shirts and cotton yarn will be subject to quotas fixed by reference to 1976 import levels.

The quotas will remain in force until the end of the year. The measures do not apply to imports from countries associated with the community and Mr Rossi said that for these countries the government would resort to the specific provisions foreseen in the various preferential agreements between these countries and the community.

The French government has also announced its intention to take safeguard measures against imports of dresses, skirts suits, trousers and cotton fabrics from Morocco, Tunisia, Spain, Turkey and Mauritius.

Brazilian minister visits UK

Angelo Calmon de Sa, Brazilian Minister of Industry and Commerce is visiting the UK this week, and on 20 June he called on Edmund Dell, Secretary of State for Trade (left).

During his visit, which ended yesterday (23 June), he attended, on 20 June, a signing ceremony at merchant bankers Morgan Grenfell relating to the Acominas steel project. He was the guest speaker on 21 June at a CBI-sponsored workshop on Brazil.

Home news

Prices policy: profit safeguard proposals

Proposals to safeguard certain minimum profit levels from the effects of the Price Commission Bill's new investigatory powers were published on 15 June. Roy Hattersley, Secretary of State for Prices and Consumer Protection, issued a consultative document that sets the safeguard proposals in the wider context of the new prices policy.

Commenting on the publication of the consultative document, Mr Hattersley said that under clause 9 of the Price Commission Bill he was required, after consultation with interested parties, to make regulations which established minimum profit levels which no enterprise could be prevented from earning as a result of investigations and examinations under the new prices policy. The numerical safeguard provided for in clause 9 of the Price Commission Bill was only one of the ways by which the viability of companies was protected during investigation and the price restriction that might follow. The commission's powers to investigate proposed price increases, to award interim price increases and to recommend price restrictions were governed by the criteria embodied in clause 2 of the bill. Those criteria made plain the government's wish to protect the interests of the efficient and competitive company. The secretary of state would have the right to vary a commission recommendation, but only to the advantage of the investigated company. The House of Commons would have power to revoke any decision by the secretary of state, again to the advantage of the company. Most important of all the composition of the commission would ensure that each investigation is carried out in a reasonable and responsible fashion.

The safeguards set out in the consultative document, Mr Hattersley continued, were not therefore what the Price Commission or the government would regard as reasonable profit levels. They were essentially a minimum, the legal protection of a level of profits below which no company would ever be forced to operate even if all the other built-in safeguards were not already there. They should not be compared with the safeguards in the present Code which, since they applied to every notifying company, necessarily operated at a higher level. The safeguards in this document were solely relevant to companies which were selected for investigation or examination.

'Clause 9 safeguards were inserted in the bill in response to demands for industry to be given reassurance. But they cannot be set at so high a level that the main intention of the Price Commission Bill is frustrated. They certainly cannot be constructed in a way which excludes a majority of companies from the powers of the bill,' Mr Hattersley said.

Consultative document

The document describes the many aspects of this policy that have been designed to reassure industry about its operation and indicates how the policy differs from the uniform and detailed controls imposed under the present price code.

The present price code safeguards are not needed for the new investigatory policy because under the new powers there will no longer be a control that erodes profit margins generally. They are also incompatible with one of the objects of investigations and examinations, which could be to question whether historic levels of profit are justified in particular cases and to reduce these levels if appropriate.

The proposed safeguard levels are therefore different from those in the present price code. The safeguards will limit the extent to which prices can be restricted during individual investigations and the extent to which price increases, prices or margins can be restricted by order following investigations or sectoral examinations under the new powers.

For manufacturing and service firms the following safeguards are proposed against the effects of freezes or partial restrictions on price increases during investigations:

1 a minimum margin of 3 per cent over total costs on each range of products or services;
2 higher minimum margins for more capital-intensive firms, calculated on a sliding scale according to the ratio between their turnover and capital;
3 an alternative minimum of 80 per cent of the margin that was earned on the relevant range of products or services at the date of the most recent price increase under the present Code;
4 the prevention of any erosion of this base margin if the enterprise concerned has been earning less than 12½ per cent on capital or 3 per cent on turnover.

After investigations, the proposed safeguard levels under '3' and '4' above will be reduced to 50 per cent of the base margin; the safeguard under '2' will not apply, but the safeguard under '1' will remain unchanged. These post-investigation safeguards will apply also to orders following sectoral examinations under the bill.

Safeguards for distributors are needed only after investigations or examinations because their margins will not be subject to restriction during investigations. The safeguard levels proposed in the document for distributors are a minimum of 2 per cent net profit margin on turnover for the enterprise or an alternative of 80 per cent of the net profit margin obtained by the enterprise in the most recent profit margin report submitted to the Price Commission under the present code. The safeguards proposed for distributors will also be available for enterprises that conduct their business through long-term contracts embodying escalation or variation of price clauses, where the safeguards proposed for the individual product ranges of manufacturing and service firms generally will be inappropriate.

The consultative document is being sent to a large number of interested organisations. There will be a further opportunity to comment on draft regulations incorporating the details of the proposed safeguards, before the regulations are made by the secretary of state to take effect after 1 August. The draft regulations will be published no later than the beginning of July. Comments on the government's proposals should be sent to arrive not later than Friday, 15 July at the Department of Prices and Consumer Protection, Prices Policy Division, Room 551, 1 Victoria Street, London SW1H 0ET. Requests for copies of the document should be made on 01-215 5743 or 01-215 3811.

Fair trading assurances

The Director General of Fair Trading announced on 15 June that he had obtained a written assurance under Part III of the Fair Trading Act 1973 from:

Monsieur Jean Guillambert, of 40 Shirley Drive, Hove, East Sussex, a car dealer.

Mr Abdul Majeed Mian, of 297 High Road, Leytonstone, London, trading as Mian Brothers, London, Hum-Loag Motors, and Sonny and Express General Agencies.

Minnow-Fish Carburettors Ltd (registered office: 165 The Broadway, Southall, Middlesex), and from Mr R. M. Henderson of Minnow House, Lochgilphead, Argyll, its director.

Treble Park Ltd whose registered office is at 14 Great Whyte, Ramsay, Cambridgeshire. A personal assurance had been obtained from the company's director, Mr Christopher P. Butler. Treble Park Ltd, traded under the name of Brandon Remould Company.

Mr Brian Michael Mann, of 3 Grantham Close, Pipers Green Lane, Edgware, Middlesex, and Mr Goodman Mann, of 19 Oakleafe Gardens, Ilford, Essex, who were both directors of The Lounge Suite Warehouses Ltd. The company which had a registered office at 207 South Street, Romford, Essex, is now in liquidation.

INSAC plan approved

The National Enterprise Board has approved the strategy developed for INSAC's activities in the computer services industry. The plan calls for peak external funding of £20 million in the first five years and the NEB has committed initial equity of £9 million to be drawn by the INSAC board as necessary. An

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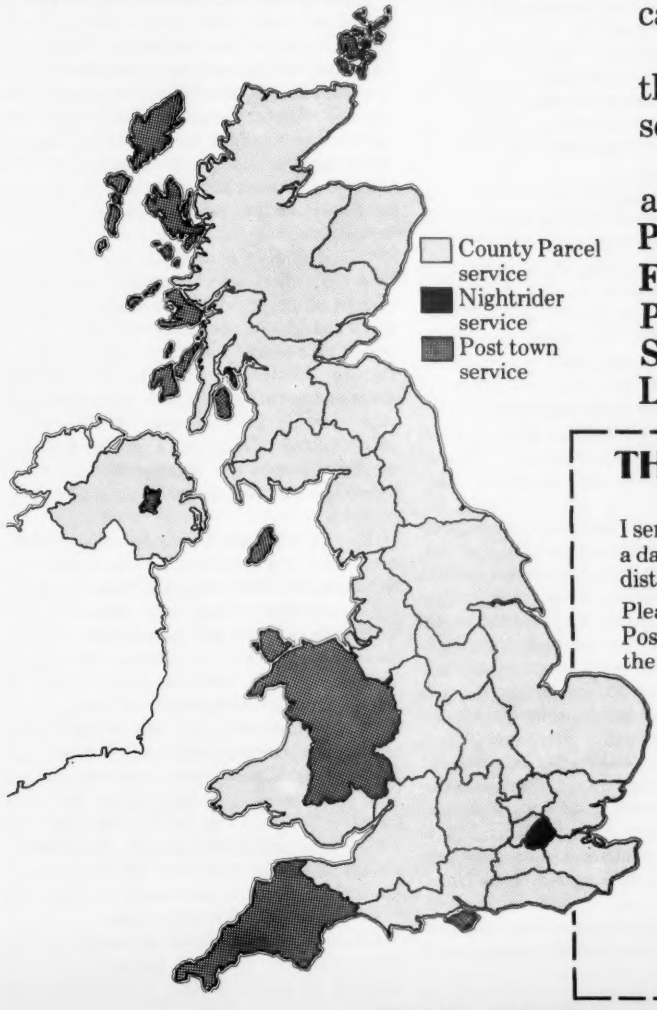

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assessment of progress and future plans will be made annually and will form the basis of any further commitment by the NEB.

INSAC was formed to enlarge the UK's share in the international computer market. In key areas such as North America, INSAC will market the services and products of UK companies. However, long-term success will depend on INSAC's funding of market-led product development. Contracts for such development will be let to companies associated with the NEB (member companies). These companies will normally market the products in the UK while INSAC will exploit them overseas. In high priority markets INSAC will establish relationships with local companies in order to ensure effective market feed-back and adequate penetration. These links will be achieved via long-term trading agreements or by acquiring interests in local companies.

Leading companies in the computer services industry have expressed considerable interest in INSAC. In addition to CAP Ltd, agreement in principle has already been reached with two further member companies. Several other companies are in active discussion with the NEB. It is planned to investigate the possibility of extending INSAC's operations to encompass selected hardware manufacturers and service bureaux at a later date.

Loan-financing restrictions to be lifted

A short restrictive trade practices bill was published on 15 June dealing with a technical problem that has come to light since the legislation was extended last year to commercial services.

Financial services were among those services brought under control and any agreement for the supply or acquisition of such services under which two parties accepted restrictions had therefore to be registered with the Office of Fair Trading. Normal loan-financing operations were not intended to be made subject to the legislation.

It is now clear that a large number of loan-financing agreements are technically registrable under the legislation because they contain restrictions on the freedom of action of lenders, borrowers and/or guarantors which are accepted by at least two parties to the agreement. The restrictions concerned are not anti-competitive in intent but are included to protect the security of the loan and to maintain the borrower's ability to repay.

These are matters which it is considered should not be subject to the registration and judicial examination procedures of the restrictive trade practices legislation. The bill is therefore designed to remove altogether loan-financing agreements which contain only this type of restriction from the scope of the legislation.

The Restrictive Trade Practices Act 1976 (which consolidated earlier legislation) provides for the registration of restrictive trading agreements with the Office of Fair Trading and for judicial examination by the Restrictive Practices Court. An agreement is registrable under the act if the parties to it include two or more persons who carry on business in the UK in the supply of goods or of services and if restrictions are accepted by two or more parties on such matters as prices, terms and conditions, areas or persons to be supplied. The legislation was extended last year to the supply and acquisition of commercial services by the Restrictive Trade Practices (Services) Order 1976 (SI 1976 no. 98) which came into operation on 22 March 1976.

Disclosure of information to trade unions

The disclosure of information provisions of the Employment Protection Act 1975 will come into force on 22 August, Albert Booth, Secretary of State for Employment, announced on 16 June. The provisions place a duty on an employer to disclose to authorised representatives of independent recognised trade unions, on request, information without which the union representatives would be materially impeded in collective bargaining, and information which it would be good industrial relations practice to disclose.

Information need not be disclosed if it would be against the interests of national security, would break the law, or would cause substantial injury to the employer. Information given to the employer in confidence, and information relating specifically to an individual or which was obtained for purposes of legal proceedings also does not have to be disclosed.

A union may complain to the Central Arbitration Committee if it considers that the requirements of the act have not been met. The committee may refer the complaint to the Advisory Conciliation and Arbitration Service for conciliation, but if this is not done, or conciliation fails, the committee has to hear the complaint and make a declaration stating whether or not it is well founded. Where a declaration is not complied with the union may present a further complaint to the committee together with a claim of terms and conditions on which the committee may make an award.

Mr Booth also said that the code of practice* on this subject prepared by the Advisory, Conciliation and Arbitration Service would come into effect at the same time. The code recently received parliamentary approval and the approved code has been issued by ACAS under section 6 of the act. The code provides guidance on good industrial relations practice in relation to disclosure of information. It lists examples of information which could be relevant in certain collective bargaining situations, relating to pay and benefits, conditions of service, manpower, performance, and financial matters. However it emphasises that these are meant to be neither exhaustive nor a check list.

Examples are given in the code of information which could cause substantial injury if disclosed in particular circumstances. The code also recommends that unions should identify and request the information they require in advance of negotiations and state as precisely as possible why they consider it relevant. Where several unions are involved requests should be coordinated wherever possible.

The code advises employers to be as open and helpful as possible and be prepared to meet requests for information promptly and present it in an understandable form. Employers and unions should endeavour to arrive at a joint understanding on the information likely to be required, its availability, form and presentation, and on procedures for resolving disputes on disclosure of information.

The code itself imposes no legal obligations on an employer to disclose any specific item of information. In determining good industrial relations practice negotiators should have regard to the code's provisions, which are admissible in evidence in relevant proceedings before the Central Arbitration Committee.

* Code of practice no. 2: Disclosure of information to trade unions for collective bargaining purposes', HMSO, price 15p.

Waste not, want not

Voluntary organisations are being encouraged to collect waste materials in a national campaign launched on Wednesday. This is the first stage of a long-term national anti-waste programme. A guide* has been prepared for use by voluntary organisations giving them information on how to organise collections, the prospects and problems associated with the various materials, and other points such as advice on publicity, banking, insurance and legislation.

'The waste we generate in our homes and in shops, offices and factories contains large quantities of potentially valuable materials but a considerable proportion of these are not being recovered,' said Bob Cryer, Parliamentary Under Secretary of State, Department of Industry. He is joint chairman, with Ken Marks, Parliamentary Under Secretary of State, Department of the Environment, of the Waste Management Advisory Council which was set up by the government in 1974.

The council have estimated that if all the additional opportunities for reclamation so far identified were exploited, there could be gross resource savings of around £150 million per annum and gross balance of payments savings of £250 million. The cost of recovery would, however, have to be deducted from these figures and increased recycling would not in all cases be technically feasible or commercially worthwhile. The first priorities are waste paper and metal scrap. An extra 1 million tonnes of waste paper a year will be needed by the early 1980s. It is estimated that an extra 400 000 tonnes of ferrous scrap and 60 000 tonnes of aluminium scrap a year could be recovered from non-industrial sources alone.

Creation of a national awareness of the waste problem and the harnessing of the energies of people willing to do something

*Save and recycle: a guide to voluntary waste collection

about it is the basic objective of the anti-waste programme under the direction of Dr Robert Berry. While the initial emphasis is on the voluntary collection of waste, there are other elements of the programme involving industry. Proposals are being developed with industry for the appointment of waste wardens at managerial level. They would be responsible for ensuring that their firms use materials with the minimum of waste and that such waste as does arise is recycled by themselves or by industry.

Packaging's contribution to the waste problem is of concern to many people. A working party with representatives of consumers, environmentalists and the packaging industry is engaged in drawing up a voluntary code of packaging practice for the industry. The controversy over refillable or non-refillable containers is being looked at by another working party. This description is preferred to returnable or non-returnable since, with improved ability to recycle material, there may be instances where a container is returnable but not refillable.

Investigation and follow up action is a key element of the anti-waste programme. This means getting more information about the quantities of waste material, whether more could be re-used or recycled, whether there are technical or economic barriers preventing this and what may be done to overcome them. Discussions have been initiated with the scrap user and reclamation industries. An annual report is being made on each of the industries using waste paper, ferrous, non-ferrous metals such as copper and aluminium, textiles and glass scrap. Each report will describe the present situation with regard to scrap arisings and reclamation in the industry, the progress being made towards collection and recycling and the limitations both economic and technical which affect its performance. A start will be made in October with the aluminium industry.

A grants scheme has been introduced by the government, total expenditure for which is £23 million, which will assist paper manufacturers to increase their capacity for processing waste paper. Research into reclamation and allied subjects is carried out at the Department of Industry's Warren Spring Laboratory which runs a waste materials exchange to provide information on supplies of waste to people who may be able to use it. Warren Spring have developed a pilot plant for separation of domestic refuse. Construction of a full scale plant at Doncaster is to start later this year. Another plant, using a different technique, for sorting household waste is planned to come into operation in 1979 at Newcastle. These plants are being built by the South Yorkshire and Tyne and Wear County councils with assistance from the Department of the Environment.

NEB invests in vehicle loading equipment company

The National Enterprise Board has acquired 48.9 per cent of the equity of Hydraroll Ltd, a Birmingham based company which supplies equipment for installation in commercial vehicles to provide easy 'roll-on' loading of pallets, crates or smaller packages.

The NEB has subscribed for 3 000 new ordinary shares of £1, at par, and has acquired 1 500 existing ordinary shares at par. In addition, the NEB has subscribed for 60 000 cumulative redeemable participating preference shares of £1 at par. The total NEB investment is £64,500.

Hydraroll was set up in 1971 by its present managing director, Mr Richard Webb. Since that time it has been developing its two principal products, Hytrack and Hydraroller Platform. The development period, during which limited sales were made, is now completed and Hydraroll approached the NEB for finance to expand rapidly in the face of the great interest which has been expressed in the products both in the UK and overseas.

Financial services in Scotland

A comprehensive guide* to the banking and financial services and facilities in Scotland is now available from the Scottish Council (Development and Industry).

This 1977 edition of 'Sources of Finance' provides information on the services available to industry from all of the banks, merchant banks and other lending agencies now operating in Scotland, many of them established in the so-called 'invasion' of Scotland by English, American and Continental banking interests in the past four years.

* 'Sources of Finance', price £4.50, is available from the Scottish Council (Development and Industry), 1 Castle Street, Edinburgh, EH2 3AJ.

Accounting and the small business . . .

Financial problems faced by small business firms and the need for planning are emphasised in a series of booklets* with the general title 'Notes for businessmen', published on 16 June by The Institute of Chartered Accountants in England and Wales.

The series deals with various aspects of management accounting and is intended for distribution by accountants and member firms, as appropriate, to their clients in small business firms. The object is not 'do-it-yourself' accounting but a description of specific financial problems of the smaller firm, for which accounting offers solutions. The booklets set out to explain these issues in general terms for the layman and to point out the areas in which he might consult expert accounting advice.

The booklets have been planned particularly with the needs of smaller practitioners in mind and are intended to go some way towards meeting a need emphasised in the Bolton report, which looks to the accountant to play an active role in 'those vital areas of management in which small businesses are weakest – costing, estimating, budgeting, and financial control'.

. . . and pension costs

'Accounting for Pensions Costs'* has been published by the Accountants International Study Group. This study examines briefly the historical background to occupational pension funds and the far-reaching developments which have taken place in pension arrangements since the war.

The study identifies a wide variety of actuarial methods in use for valuing fund assets and liabilities and the various factors taken into account in the valuations. Insofar as these methods and assumptions are used for accounting purposes, variations in the calculated amounts of pension costs are possible which may materially affect the amount reported as profit by the employer. The study group has therefore concluded that the number of acceptable valuation methods used for accounting, as opposed to funding, purposes should be reduced as far as possible.

It is also concluded that disclosure in company accounts is, for the most part, inadequate and the study puts forward a number of suggestions for their improvement. The four appendices contain some useful information on actuarial methods of valuing both fund liabilities and their assets, together with a most helpful glossary of terms in common use on both sides of the Atlantic.

* 'Preparing Budgets', 'Controlling Costs', and 'Spending on Capital Equipment', price 20p per copy, and 'Accounting for Pension Costs: Current Practices in Canada, the United Kingdom and the United States', price £1.40, are available from the Publications Department, The Institute of Chartered Accountants in England and Wales, P.O. Box 433, Chartered Accountants' Hall, Moorgate Place, London EC2P 2BJ.

Finance for chemical industry

Opening the international chemical and process engineering exhibition in Birmingham on 20 June, Minister of State for Industry Alan Williams drew attention to a wide range of government financial assistance available to aid expansion of the chemical and petrochemical industries.

The accelerated projects scheme, under which government assistance of £84 million led to £640 million worth of additional investment, had now expired, he said, but under its successor, the selective investment scheme, there were already some 130 projects receiving detailed appraisal.

It was now the time, Mr Williams explained, for chemical companies and their suppliers to consider whether their own plans could be advanced under this scheme. It was particularly important that plant and equipment suppliers should be thinking about this to avoid bottlenecks appearing as the upturn gathered momentum.

Mr Williams went on to say that suppliers should also be thinking about improvements in product design. The selective investment scheme made provision for product development where this was part of a capital investment programme, but the Department of Industry's requirements boards also had up to £500,000 for worthwhile projects.

Price Commission interventions in May

During May the Price Commission rejected 16 notifications of price increases from manufacturing and service companies in Categories I and II. In another 14 cases the companies concerned withdrew their notification of intended increases and in 48 cases the extent of the increases was reduced by the Commission.

Following inspection of records kept by enterprises in Category III, the Commission's Regional Offices secured the agreement of 137 distributors, 10 manufacturers, four service enterprises, three professional enterprises and six construction enterprises to make price reductions amounting to £4.67 million in order to eliminate excess gross or net profits. In addition, the regional offices secured a total of 114 individual voluntary price reductions following investigation or complaints about prices increases.

The lists include a number of rejections of notifications of increases in the price of cements. Since the May lists were compiled cement companies have submitted further price increase notifications. These have been considered by the Commission and abated; they will appear in next month's lists of interventions.

The Price Commission may intervene to reject or modify notifications submitted by Category I and II enterprises at any time during or after the 28 day period which must elapse before the increase can be implemented.

Announcements about price increases where the Price Commission has not intervened are the responsibility of the company imposing the increase. The inclusion of an item in the lists of rejections or withdrawals does not preclude subsequent re-submission.

In some cases a company may submit a single price increase notification involving a range of products. If some items within the range are subject to intervention, the whole notification, for statistical purposes, is treated as a modification.

Rejections

Company/product	% increase sought
CATEGORY I	
Associated Portland Cement Manufacturers Ltd	
OPC/RH cement	7.72*
Associated Portland Cement Manufacturers Ltd	
OPC/RH and coarse ground cement	5.59
Associated Portland Cement Manufacturers Ltd	
Special cement	9.87
Associated Portland Cement Manufacturers Ltd	
Special cement	4.16
Delta Capillary Products Ltd	
Capillary fittings (copper and gunmetal)	8.40
EMI Hotels and Restaurants Ltd	
Catering services	15.12
Rugby Portland Cement Co Ltd	
OPC/RH cement	7.72*
Rugby Portland Cement Co Ltd	
OPC/RH cement	8.07†
CATEGORY II	
Aberthaw and Bristol Channel Portland Cement Co Ltd	
OPC/RH cement	7.72*
Ketton Portland Cement Co Ltd	
OPC/RH cement	7.72*
Osborn Steels Ltd	
Wire rod	4.50
Ribblesdale Cement Co Ltd	
OPC/RH cement	7.72*
Ribblesdale Cement Co Ltd	
OPC/RH cement	8.07†
Tunnel Cement Ltd	
OPC/RH cement	7.72*
Tunnel Cement Ltd	
OPC/RH cement	8.07†
West Kent Cold Storage Co Ltd	
Storage prices	14.99

* Weighted average under Price Code para 65(1).
† Weighted average under Price Code para 65(2).

Withdrawals

Company/product	% increase sought
CATEGORY I	
Allied Mills Ltd	
Bakers bread flours	2.03
ICI Ltd	
Petrol	3.14
Spillers-French Baking Ltd	
Long-life flour confectionery	9.90
T. Wall and Sons (Ice Cream) Ltd	
Ice cream and allied products	3.997
CATEGORY II	
Anglia Television Ltd	
Television advertising rates	19.90
Armitage Shanks Group Ltd	
Plastic products	3.99
L R Industries Ltd	
'Saf-t-coils'	28.26
D. Meredew Ltd	
Furniture	4.89
Mettoy Co Ltd	
Toys	1.30
Preston Farmers Ltd	
Animal feedingstuffs	1.43
SKF Tools (UK) Ltd	
Screw thread cutting tools and gauges	7.50
Singer Co (UK) Ltd	
Sewing machines and spare parts	2.80
Turner Manufacturing Co Ltd	
Gear boxes and parts	5.47
Twiflex Couplings Ltd	
Power transmission units, clutch couplings and shafts	6.50

Modifications

Company/product	% increase sought	% increase after modification
CATEGORY I		
AEI Cables Ltd		
Elastomeric and plastic insulated cables and flexible cords	12.77	10.52
Allied Bakeries Ltd		
Cakes, buns and fermented goods	6.00	4.50
Bakelite Xylonite Ltd		
Low density polyethylene	6.99	6.33
Dairy Produce Packers Ltd		
Cheese spread	13.25	12.48
ICI Ltd		
Knit-back vynide	11.88	11.22
ICI Ltd		
Woven-back vynide	10.77	9.66
Pirelli General Cable Works Ltd		
Power cables	16.74	16.62
Post Office		
Postal services	9.81	9.09
RHM Foods Ltd		
Household packet and bulk flour	6.07	5.95
Rist's Wires and Cables Ltd		
Harness assemblies and components supplied to the automotive industry	18.02	17.99
Thorn Lighting Ltd		
All light sources, fittings, control gear and all accessories	3.95	3.75
CATEGORY II		
Armstrong Patents Co Ltd		
Components for the motor car industry	1.36	1.32
Avalon Furniture Ltd		
Complete range of products	5.00	3.00
BBA Group Ltd		
Belting products	14.87	13.48
Barnett and Foster Ltd		
Essences, extracts and flavours	6.50	6.13
Brickhouse Dudley Ltd		
Cast iron products	3.00	2.40
Consolidated Pneumatic Tool Co Ltd		
Pneumatic and electric tools and portable air compressors	4.70	4.54
Consort Furniture Ltd		
Furniture	9.702	8.931
Crane Fruehauf Trailers Ltd		
All trailers and vehicles	5.715	5.675
Dart Industries Ltd		
Injection blow moulding	10.00	5.00
Dowty Electrics Ltd		
Aircraft and industrial electrical equipment	7.23	7.12
EEC Quarries Ltd		
Roadstone, concrete, aggregates and bituminous products	13.554	11.00
W. R. Grace Ltd		
'Teroform' sound deadening material	17.093	12.56
Greengate Cables Ltd		
Electric cables	6.49	5.92
Howard Harvestore Ltd		
Agricultural harvestores and ancillary equipment	5.56	4.71
Johnson and Johnson Ltd		
Products of the Consumer Division	2.139	2.099
Johnson Wax Ltd		
'Pledge'/'Sparkle'	3.90	3.80
'Woodcare'/'Favour'	2.50	2.50
Goddards Group products	4.30	4.00
'Force'	2.20	nil
'Auto'	11.00	11.00
'US Shampoo'	7.40	7.40
3M United Kingdom Ltd		
Coated abrasives	4.40	3.71
Marshalls (Halifax) Ltd		
Concrete products	7.29	6.37
Morgan Grampian Ltd		
Advertising rates of various weekly and monthly magazines	3.73	3.55
Myson Fans Ltd		
Industrial fans	18.00	10.52
Portals Ltd		
Lightweight papers	10.00	9.80
Sandoz Products Ltd		
Clayton and manufactured dyestuffs and colour mixtures	17.81	14.11
Silcock and Colling Ltd		
Delivery charges for motor cars and commercial vehicles	14.86	12.27
TRW Valves Ltd		
Components for automotive industry	5.56	5.55
Tay Textiles Ltd		
Jute yarn	20.57	16.61
United Carriers Ltd		
Parcel rates	7.75	6.93
Wellcome Foundation Ltd		
'Tribrissen', 'Frantin' and 'Trivetrin'	13.745 to 35.747	0 to 35.747
Wellcome Foundation Ltd		
'Famosan'	14.086	5.634
'Rinsan'	20.529	20.529
Wellcome Foundation Ltd		
'Sanaklenz'	8.018	7.164
Wellcome Foundation Ltd		
Range of animal health products, except the following items:	8.80 to 21.85	8.80 to 21.85
'Haloxil'	14.648	14.529
'Scolaban' tablets (100 mg)	16.00	14.285
Wellcome Foundation Ltd		
'Thermalon', 'Ancaris', 'Coriban', etc.	9.111 to 15.812	8.656 to 14.472
Wellcome Foundation Ltd		
Fluke and worm drench 900 dose	22.465	22.465
Fluke and worm drench 4500 dose	25.085	25.085
'Formalin'	12.352	12.267
Wellcome Foundation Ltd		
Maggot flyspray and fly dip	14.269 to 44.516	12.936 to 44.516
Wellcome Foundation Ltd		
'Brit' concentrate	12.49	12.49
'Red Label' hypochlorite (10 litres)	12.698	12.30
'Sanatank'	15.77	15.77
Wellcome Foundation Ltd		
'Sanaklenz'	19.767	19.767
'Red Label' hypochlorite (25 litres)	22.801	22.801
'Mastrite' teat dip (25 litres)	13.045	10.523
Wellcome Foundation Ltd		
'Mastrite' teat dip (10 litres)	12.121	9.090
Wellcome Foundation Ltd		
'Circosan' Mk II	16.307	16.307
'Sanatank'	10.757	4.898

Government sales

Ministry of Defence

Sales by auction

2 July 1977—Furniture

Location
RAF Swinderby, Lincoln

Auctioneers
British Car Auctions Ltd (Dept L), Burgass Road, Porchester Road, Nottingham (tel. 0602 873311)
A sale of some 500 lots of household furniture and other household effects which will be lotted as single items or in small quantities.

5 and 6 July 1977—Miscellaneous stores

Location
Central Ordnance Depot RAOC, Bicester, Oxon

Auctioneers
Midland Marts Ltd (Dept L), 4 Market Square, Bicester, Oxon OX6 7AL (tel. 08692 2073)

Stores lying at COD Bicester and other depots comprising clothing and textiles, vehicles, forklift trucks, machine tools, tentage, tyres and MT spares, engineers and electrical equipment, and large quantities of furniture and other miscellaneous items.

13 and 15 July 1977—Miscellaneous stores

Location
The Great Danes Hotel, Ashford Road, Hollingbourne, Near Maidstone, Kent

Auctioneers
Fuller, Horsey, Sons and Cassell (Dept L), 52 Bow Lane, London EC4M 9ET (tel. 01-248 7954)
The stores which are lying at various depots include vehicles and MT spares, jerricans, machine and hand tools, watches, clocks, binoculars, photographic equipment, textiles and a large quantity of household furniture.

Catalogues which give details of the lots, conditions of sale, viewing times, etc, are available from the auctioneers from two weeks before and up to the day of the sale, price 20p, postage and packing 10p extra (postal orders only).

Finance for technology

The National Research Development Corporation provides financial and other support for technological developments of potential commercial importance. NRDC promotes the adoption by industry of new products and processes invented in government laboratories, universities and elsewhere. NRDC is participating in joint ventures with industry on an increasing scale. By supporting projects NRDC makes it possible for individual firms or groups of companies to undertake and accelerate the development and production of new products and processes of national importance. The corporation welcomes submissions in confidence from firms who have promising new projects to launch in any branch of industry or commerce. The conditions for its considering proposals of this kind are set out in a leaflet which may be obtained on application, either by writing to the National Research Development Corporation, Kingsgate House, 66-74 Victoria Street, London SW1E 6SL; or by telephoning 01-828 3400.

Wembley Auction Sales 1977

5 July 1977

View Days:	Day preceding and morning of sale
Location:	Department of the Environment Property Services Agency Supplies Store India Pavilion Exhibition Grounds Wembley, Middx. Tel. 01-903 2508
Description of Goods:	Office and Miscellaneous Furniture Engineering, Electrical, Canteen, Domestic and Other Equipment
Auctioneers:	Messrs. Fuller, Horsey, Sons and Cassell 52 Bow Lane London EC4M 9ET Tel. 01-248 7954
Catalogue:	Direct from the auctioneer price 10p each

Potential buyers are advised to refer to the official catalogue available direct from the auctioneers price 10p.

ENCIRCLE TI 537 ON PAGE 651 FOR FURTHER INFORMATION

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ENCIRCLE TI 524 ON PAGE 651 FOR FURTHER INFORMATION

New products

Freepost reader service

For further information on items in this section, circle the corresponding number on the reader services page near the end of the magazine.

Low-cost autoranging counters

Malden Electronics Ltd have announced the introduction of two low-cost autoranging counters. It provides industry with high accuracy autocounting instruments at the same cost as ordinary manually-operated counters. One model (8846) measures up to 15 MHz, and the other model (8847) covers up to 80 MHz.

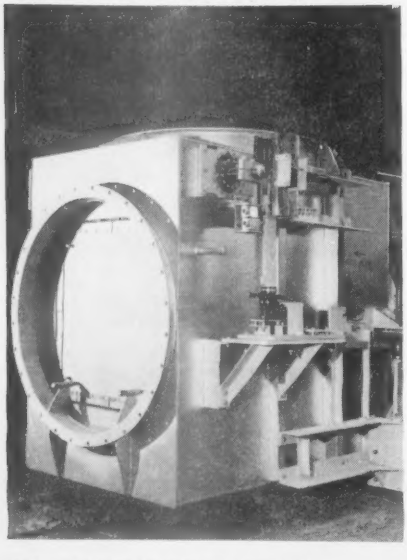
Both counters are designed to be used in the 'hands-off' mode or as conventional manual instruments and they may be used as stand alone instruments or incorporated into automatic test equipment systems. When the 'auto' switch is pressed, fully automatic frequency measurement from 10 Hz up to the maximum range (15 MHz or 80 MHz) is obtained without operator intervention. In-built pre-settable trigger level control and automatic range changing prevents over-ranging and ensures the best resolution at all times. Other features include a sensitivity of 10 mV, automatic decimal point and unit display and leading zero suppression. Model 8847 (80 MHz) has a 7-digit display and model 8846 (15 MHz) has 6 digits – both use individual plug-in LEDs.

Further information: circle 458

Gas turbine isolating valve

The Metro-Flex combination-flap isolating valve shown here has been developed for use with gas turbine waste-heat recovery systems. Arranged to accomplish the dual tasks of directing the turbine exhaust gases either through the boiler with the dump stack sealed or to atmosphere via the dump stack with the boiler securely isolated, it occupies much less space than previous designs, reduces the number of working parts previously required by some 50 per cent and yet provides a guaranteed 100 per cent sealing of the boiler from the turbine exhaust gases. Maintenance personnel, therefore, are able to overhaul or repair the boilers in complete safety with the gas turbines still on load.

Further information: circle 459



'Hands free' security

A low-cost electronic security device for guarding ordinary interior and exterior doors during working hours in offices, computer-rooms, and similar busy working areas is announced by Lewis Security Systems Limited.

The K9 coded hands-free door control, marketed under the Mastiff Systems label, is easy to install on any type of door, including automatic doors. It puts the operation of the door-lock or automatic-door mechanism under the control of coded pocket-sized radio transmitters which authorised entrants simply carry in the pocket or wear clipped to their clothing. The transmitter's radio signal automatically releases the door-lock when an authorised person approaches the door.

On the technical level, the high degree of security claimed for K9 results from the special system of transmitting codes which provides several thousands of possible code combinations. The convenience of using K9 is, however, its most important security benefit. Since no physically delaying action is required, such as turning a key or inserting a card in a slot, authorised staff do not regard the security as a nuisance or hindrance to their work and there is no temptation to prop the door open for 'brief' exits.

Further information: circle 460

Sewage unit for existing ships

Designed specifically for installation on existing ships is an extensive range of marine sewage treatment systems, the Retrofit Trident, developed by the pump and compressor division of Hamworthy Engineering Ltd. The various processing compartments have been designed as separate watertight tanks so that they can be manoeuvred through hatchways and watertight doors, and then linked together in situ to form a complete unit.

There are three separate tanks, two for aeration purposes and another combining the settling and chlorination chambers. The dimensions ensure they can be transported through spaces down to 880 mm (2 ft 10 in) wide. This facility overcomes problems previously facing shipowners when installing sewage treatment systems on existing ships. Often this has involved the expensive process of cutting an access in the hull and usually requires a dry dock operation.

The Retrofit Trident has already been granted United States Coast Guard certification as a type II device. This is the highest standard and requires that suspended solids must not exceed 150 mg/litre and that the coliform bacteria count is no greater than 200/100 ml.

As with Hamworthy's other sewage treatment range, the Retrofit Trident operates on the extended aeration principle of purification, the processing cycle, at the specified flow rate, taking about 24 hours. The resultant effluent is innocuous and can be discharged overboard or retained. If required the Retrofit Trident can be linked with Hamworthy's Neptune marine incinerator for disposal of excess sewage sludge.

Further information: circle 461

Portable tv camera for studio or outdoors

A picture of true broadcast quality and with a lightweight easily handled camera head are features of the new EMI 2008 television camera. Rugged construction and the option of total mobility for the whole equipment, make it suitable for use both in the studio and in the field. Development of this new camera was jointly by the broadcast equipment division of EMI Sound and Vision Equipment Ltd, and CEI (California, United States). It is built to operate on all world standards and appropriate models will be marketed by EMI and CEI to customers throughout the world.

Further information: circle 462

Rope tensiometer

For the offshore, mining and civil engineering industries is the 'Data Line' running line tensiometer announced by Transducers (CEL) Ltd. This rugged three pulley device, with its associated electronics, is basically a data acquisition sensor whose pulley wheels are profiled to give optimum performance of the rope being used. It will fit onto any slack wire or other type of rope and continuously monitor the tension in that rope, even in very harsh operating environments. A contactless opto-electronic data encoder can also be incorporated into the device, if required, to measure the distance, direction and speed that the rope may have travelled. This can give a total and often vital profile of the behaviour of the rope while it is in use.

The 'Data Line' will prove ideal for operation in those situations where extremes of temperature and corrosive atmospheres are prevalent. The whole assembly is completely protected by the use of special stainless steel and metal finishes. Its associated electronics are housed in a weatherproof casing mounted on a side plate, while the bearings are totally sealed and marine approved. The heart of the Data Line equipment is the load sensitive axle of its centre pulley. This axle is a fully-welded and environmentally-protected shear pin that incorporates a unique combination of bonded strain gauges to detect any change in the rope being monitored.

Further information: circle 463

Constant wattage transformers

Fluctuations in the wattage produced by a power transformer can be harmful or even dangerous. For instance, electric arc tubes can run on and turn out rapidly if they are not powered from a controlled source. Using the techniques and experience gained in providing units for ultra-violet curing installations, Primarc Lamps and Transformers Ltd have now developed a whole range of transformers specifically for this sort of application.

Available in any output up to 100 kVA the transformers were developed because no existing ones could provide the stability that was required. The company anticipates that, initially, demand will come mainly from users of high voltage electric arc equipment but that eventually it will broaden to include any manufacturer requiring guaranteed wattage.

Further information: circle 464

Coiled stainless tube

Small diameter welded stainless steel tube in coiled lengths from 25 to 200 m long is now available from TI Tube Products Ltd. Supplied in the bright annealed condition to facilitate subsequent manipulation, Tru-Wel longitudinally-welded tube, in the standard grades of stainless steel such as T304, T321 and T316, is particularly suitable for heat exchangers, heating, cooling and ventilation systems. Its smooth finish in the bore and on the outer surface allied to its corrosion-resistant properties make it eminently useful for applications in the food, dairy and drink markets where hygiene is a key factor.

Stainless tube in diameters up to 10 mm ($\frac{3}{8}$ in) in coiled form in such long lengths offers major economic benefits. Cost savings can be achieved as a result of scrap losses being minimised. The Tru-Wel stainless tube in the coiled form simplifies handling and stocking and avoids the need for a range of different cut lengths. Coils have a diameter of approximately 1 m and can weigh up to 25 kg depending on tube size and length.

Further information: circle 465

Air handling plus lighting

Aesthetic and practical problems of installing air handling and lighting tracks within a ceiling membrane have been overcome with the introduction by Martingale Technical Services Ltd of a completely integrated air handling/lighting track. Called Airlec 25, it outwardly resembles a multi-slot air handling/ceiling support system. However, as well as providing these two functions, it also incorporates a conventional lighting track. To ensure that there is the widest possible choice of lighting fittings, it can be supplied with such well known electrical tracks as Concorde Rotaflex, NMS, Edison Halo and Thorn Trackline.

Great care was taken during its development that the incorporation of a lighting track did not derate its air handling performance. The air handling slots provide high discharge rates and are fitted with air direction blades to allow horizontal, left or right deflection and also cater for complete dampering.

It is available in 2.4 m or 3.6 m lengths as standard and is provided with male and female connections.

Further information: circle 466

'T & I' index inquiries

Readers wanting to know when articles and items of information were published in *Trade and Industry* should consult the published indexes which are issued free to subscribers. For material published in recent months, inquiries of this kind can be made to the Department of Industry Library's indexing section, tel. 01-215 5842. (Alternative no 01-215 5051.)

Driver comfort with tractor

This four-wheel tractor with walk-through flat floor, air conditioning, radio and other driver comforts has been introduced by County Commercial Cars Ltd. The County 1174 has a low profile for stability on steep land and meets all current safety and noise requirements. It is powered by a Ford six-cylinder diesel engine that develops 112 bhp at 2300 rpm and is equipped with the latest in smoke emission controls. Efficient use of available engine power is assured through a gearbox that has 16 forward and 4 reverse gears. Operator comfort has dominated the design of the cab and the flat floor, with right-hand gear levers, is clean and uncluttered allowing easy access. Clutch, brake and throttle are suspended from below the instrument console which includes full power hydraulic-hydrostatic, multi-position steering wheel with the usual switches and controls.

Further information: circle 467.

Technology news

Waveguide: high-capacity telecommunications at lower cost

The world's first commercial waveguide phone system, a communications 'highway' capable of carrying half-a-million calls at once, has been given the go-ahead by the Post Office.

A waveguide tube about the diameter of a car exhaust pipe will link Bristol and Reading in a £7 million project due to become operational by 1983.

Sir Edward Fennessy, deputy chairman of the Post Office and managing director Telecommunications, commented 'To have developed this waveguide to commercial exploitation from scratch is a tremendous achievement for the Post Office's Research Department and the firms, BICC and Marconi, who collaborated with us'.

He went on to point out that since 1970, calls had risen from 10 000 million to 16 000 million a year. Waveguide would make it possible to provide new services with the minimum of extra cost.

The new waveguide, a spiral of copper wire round the inside of a glass-reinforced plastics tube, is a design unique to Britain.

Its capacity of 500 000 phone calls, or some 300 television pictures, is far greater than anything that can be provided by conventional telephone cable. At present, the largest inter-city cable in service can carry just over 16 000 phone calls at once. A supercable being constructed to link London with the Midlands and north-west of England will have a capacity of nearly 100 000 calls, large by normal cable standards but barely a fifth of the waveguide's capacity.

The Post Office will shortly be starting discussions with Marconi for the supply of the electronic equipment, BICC for the waveguide and the British Steel Corporation for the manufacture of the steel pipe in which the waveguide is housed.

Detailed planning of the 125 km route is now under way. To increase the security of the system, 110 km of the route will go across country.

The waveguide will be housed in a continuous steel pipe, of 100 mm diameter. Construction and laying of the pipe will be due to start in 1979, for completion in 1980. Installation of the waveguide in its protective steel pipe would then follow immediately afterwards, to be finished by 1981.

Five booster stations will be needed at roughly 20 km intervals along the route to house electronic equipment that will maintain the strength of the electric wave that carries the calls along the tube. Installation of this equipment is scheduled for 1982.

The proposed waveguide system will, at Reading, be provided with links to the supercable system, over a spur of the cable from Reading to High Wycombe. At Bristol, connections would be made from the waveguide to cable and microwave radio links to South West England and South Wales. These connections would include links to the new satellite communications earth station at Madley, Hereford, and to the existing earth station at Goonhilly, Cornwall.

Waveguide uses a method of sending phone calls, known as digital transmission, which is being progressively introduced into Britain's telecommunications network. Digitial transmission converts the wave pattern of telephone speech into on-off electrical impulses. This makes more effective use of existing cables, enabling them to carry a mixture of services, such as television, computer data, and facsimile as well as speech, more cheaply than at present.

Chemical disposal problem in Bangladesh

Two Harwell scientists have now returned from several weeks in Bangladesh assessing the problems associated with the disposal of spoilt pesticides.

Most of the materials were imported from western countries over the past 10 years and distributed throughout Bangladesh through a system of local stores.

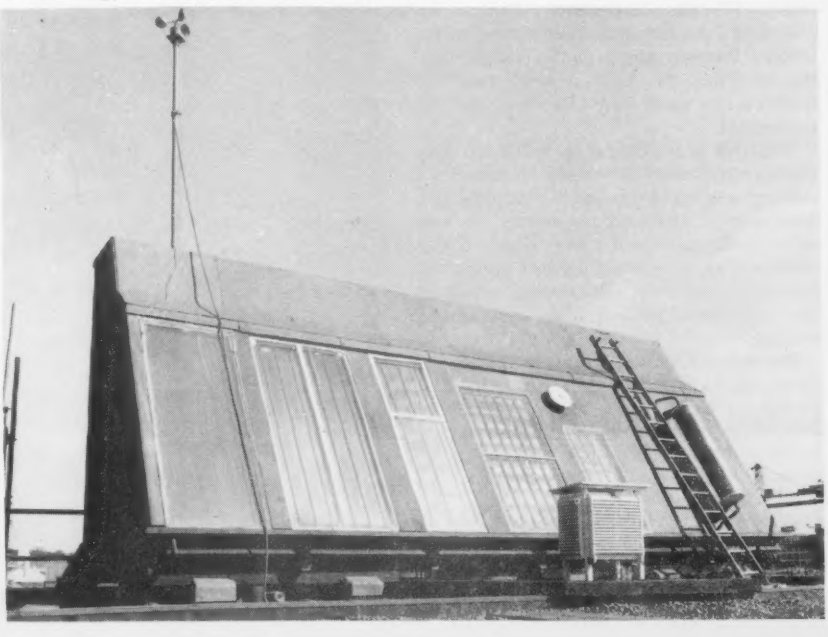
Often the rough manual treatment they received in handling resulted in many containers being damaged, with consequent leakage of highly toxic materials. Solids packed in plastic and hessian sacks leaked as the containers rotted in the intense sun. Drums rusted through during the monsoon period. This resulted in heavy contamination of the stores, and often of local water supplies. Fish died, and there was an obvious public health risk.

Dr Frank Feates and Ken Pearce, both of Harwell's hazardous materials service, which already has widespread experience in the disposal of dangerous chemicals in the UK, were called in by the Ministry of Overseas Development. During their stay they travelled all over Bangladesh, assessing the magnitude of the problem. They will now prepare a report which will suggest to the Bangladesh Government ways in which the spoilt materials, which amount in total to some 700 tonnes, can be disposed of.

Harwell staff expect to return to Bangladesh during the next dry season (beginning about November) to supervise operations.

Testing solar panels

A test rig on which John Laing Research and Development, at Boreham Wood, can try out six different types of solar collectors. This is part of a project to develop a solar system to provide domestic hot water, and each panel on the rig is connected to an individually monitored hot water system. John Laing Research and Development is one of the firms negotiating with the Department of Energy for up to 50 per cent government funding, designed to encourage firms to look more closely at solar energy. **Further information: circle 468**



Protecting subsea pipelines

An aluminium-based alloy, Galvalum 3, has been added to the range of sacrificial anode materials manufactured and supplied by BKL Alloys Ltd of Telford for the cathodic protection of subsea pipelines, offshore oil production platforms, drilling rigs, and shipping.

It is said to be better and cheaper than zinc-based materials in saline mud for protecting buried pipelines and similar applications and it can be used in low and high temperatures and at great depths. It is also suitable in estuarine waters of relatively high resistivity caused by fresh water dilution, and heat exchangers and other oilfield equipment which handles brine.

There is no magnesium or mercury in the formula. It is therefore ideal for systems installed in oil carrier ballast and cargo ballast tanks, and in areas where pollution is a possible ecological hazard.

It is also said to be less liable to crack during cooling, and in damp storage conditions, less likely to oxidise, or 'feather' than most other anode materials. In use, it tends to dissolve much more evenly. It is supplied in a range of straight and bracelet anode configurations and sizes to suit all purposes.

Corrosion at sea is caused mainly by electrochemical action between metals with the seawater acting as an electrolyte. In this battery action, current flow ionises the more electrically active or anodic metals which dissolve to produce the pitting effect characteristic of this type of corrosion.

'Sacrificial anodes' are made from alloys which are much more anodic than the metals of the structure they are designed to protect. Thus the current generated flows from these anodes which corrode in preference (or sacrificially) to the structure to which they are attached.

Further information: circle 469

NCC guide to software

Poor or inadequate documentation can mar the acceptance of an otherwise good product. So that accurate information can be passed from supplier to user, the National Computing Centre in Manchester, has produced a new guide, 'Documentation of Software Products'. Its object is to bring producers and users closer together and reduce problems in implementation and operation.

To support the program or package that has been either bought or is being considered, every user needs the right kind of documentation for his particular tasks. It must be relevant, at the right level of detail, and complete.

This book was produced with the aid of a consultative committee (consisting of manufacturers, software houses, documentation specialists and users), and provides guidelines for both suppliers and users.

Suppliers will find help on what to produce, how to produce it and how to provide the right kind of documentation for their buying public. Criteria are also suggested against which they can evaluate and test the documentation, just as they test the software itself.

Users will find advice on what to expect when making their decisions on buying, installing and using software, and in training staff.

Further information: circle 470

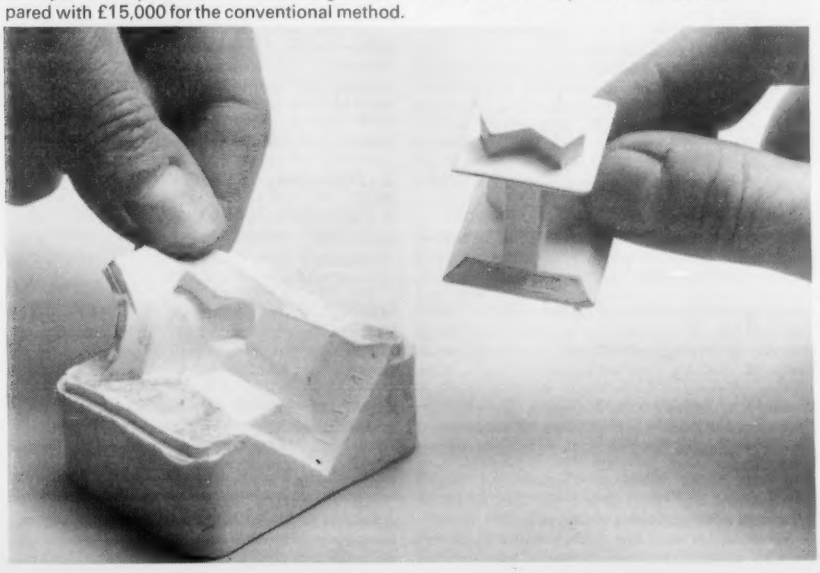
Optics market study

Current world markets for optical and electro-optical equipment are to be evaluated in a study sponsored by the Department of Industry. The study, which is being conducted by Sira Institute Ltd, aims to forecast market growth and to predict likely major developments in equipment capabilities and applications. Sira Institute will review the performance, profile and history of leading companies throughout the world and assess the past, present and possible future position of UK optics and electro-optics manufacturers compared with those of major competing nations.

The study will comprise both desk and field research and a technology forecasting exercise conducted with leading experts in the fields of optics and electro-optics. The field interview programme will cover companies in the UK, Western Europe, USA and Japan. Submissions are welcome from individuals or companies in any sector of the industry whether optical/electro-optical elements, sub systems or end-use products. The study is not however concerned with military or ophthalmic products except where involvement in these sectors is material to the past or present performance and growth of a company or domestic industry. Written submissions should be sent to the Project Leader, John Drake; at the Sira Institute, South Hill, Chislehurst, Kent BR7 5EH, tel. 01-467 2636.

Moulding impossible shapes

A chess piece of contemporary design is removed from its mould after production by a process invented and developed by Bradbury Controls Ltd, and claimed to use completely new plastics technology. The chessman has no visible 'split-line', the joint line where the mould is opened to remove the piece. Called hydro-plastic moulding (HPM), the process involves injecting molten thermoplastic into a flexible mould contained within a rigid mould. The company claim that HPM can mould previously impossible shapes and products composed of a number of different materials. The product will not shrink and the size of the component can be altered within the mould merely by altering the pressure of the tool. Tooling costs are also claimed to be drastically produced. One example was a special switch the tooling costs of which were £150 by the HPM method, compared with £15,000 for the conventional method.



Radiation service centre

Radiation Dynamics Ltd of South Marston, Wiltshire, manufacturers of a wide range of linear accelerators for industry, medicine and research, has started constructing a radiation service centre which should be in full operation by late summer of 1977.

This will mean that British industry will be able to rent time on an electron accelerator for experimental work, pre-production and full production runs, and suitable applications will be the electron beam processing of wire, cable, plastic tubing, sheet, foam rubber and semiconductors. It could also be used for electron beam sterilisation of medical disposable products, and treatment of bulk chemicals and many other plastic and rubber products.

Further information: circle 471

R&D statistics

Implications of changes in R&D expenditure and employment from 1967 to 1975 are discussed in an article on page 638.

Parliament

Monday, 13 June

Added value

Gwilym Roberts (Cannock) asked the Secretary of State for Prices and Consumer Protection, if he would consult with interested parties with the aim of introducing a United Kingdom added value system for consumer goods, so that consumers are aware not only of price but also of the United Kingdom added value; and if he will encourage the purchase of goods with a high percentage United Kingdom added value by publicising the taxation and other advantages of high United Kingdom added value.

Mr Fraser said that it would not be practicable to introduce a requirement that UK added value be marked on goods displayed for sale.

Mr Roberts also asked the Secretary of State for Industry, if he would advise public and private sector bodies which came within his field of responsibility to insist on being given not only a price but also the United Kingdom added value for the goods they purchased and thus encourage them to purchase goods with a high United Kingdom added value percentage.

Mr Huckfield replied that he was not convinced that to impose such a requirement indiscrimately across the board would be an effective way of achieving what Mr Roberts sought.

Mr Roberts then asked, what were the problems and advantages of determining the United Kingdom added-value component in the prices of industrial products; and if the Secretary of State would carry out a study and make a statement.

Mr Huckfield: 'I afraid that the complexity and costs of making dependable valuations throughout industry far outweigh any advantage that might be found in such information.'

Regional policy effectiveness

Robert Hicks (Bodmin) asked the Secretary of State for Industry, if he was satisfied with the workings and effectiveness of the Government's regional policies, particularly as they affected the South-West Assisted Areas.

Mr Cryer said that a recession tended to reduce the effectiveness of regional policies but that this should improve with an improvement in the economy.

Motor industry productivity

Robert Adley (Christchurch and Lymington) asked, what was the level of productivity in the motor industry expressed in percentage terms, compared with the level of productivity in the motor industries of West Germany, France and Japan, respectively.

Mr Williams referred Mr Adley to the Report on the Future of the British Car Industry by the CPRS which concluded that, in terms of vehicles per employee, productivity in the British motor industry appeared to be approximately 30 per cent below French and German levels and 60 per cent below the Japanese level in 1973. He said that comparisons of this sort were complicated not only by product mix but also by the degree of vertical integration, the relative level of labour costs and the amount and quality of capital equipment with which employees had to work.

Japanese factories in UK

Doug Hoyle (Nelson and Colne) asked the Secretary of State for Industry, what representations he had received from Japanese companies to set up factories in the United Kingdom.

Mr Williams said that three Japanese companies were at present discussing with the department the conditions under which they might set up factories in the United Kingdom.

British industry investment levels

Peter Viggers (Gosport) asked the Secretry of State for Industry, if he was satisfied with the current level of investment in British industry.

Mr Williams said that investment had generally been on a rising trend and all the recent investment intentions surveys pointed to substantial increases this year and even larger increases in 1978.

Industry for Greater London

William Molloy (Ealing North) asked the Secretary of State for Industry, if he would now take steps to encourage new industries to move into the Greater London area.

Mr Cryer said that the forthcoming White Paper would contain proposals to encourage industry in inner urban areas including those of London.

North Sea oil exhibitions

Gordon Wilson (Dundee East) asked the Secretary of State for Energy, what conferences or exhibitions in the United Kingdom or abroad dealing with North Sea oil had either been sponsored or financed by the government; and to give the location, general theme and cost of each such conference held during 1976.

Mr Meacher gave the following information. In 1976 the British Overseas Trade Board supported participation by UK firms at eight overseas exhibitions and associated conferences concerned with the offshore oil and related fields. Details were as follows:

Venue and event	Date 1976	Cost to BOTB (£)
Singapore: Offshore Oil Exhibition and Technical Conference	February	51,918
Amsterdam: European Exhibition for Petroleum Technology	April	29,754
Houston: 8th Annual Offshore Technology Conference and Exhibition	May	136,196
Tulsa: International Petroleum Exposition	May	11,228
Calgary: National Petroleum Show	June	15,278
Stavanger: Offshore North Sea Oil and Gas Exploitation Exhibition	September	50,784
New York: International Liquid Nitrogen Gas/Liquid Petroleum Gas Exhibition and Congress	October	26,507
Rio de Janeiro: British Marine and Offshore Equipment Exhibition and Seminar	November	25,280

The Stavanger promotion was the only event concerned exclusively with the North Sea. Twenty-one firms took part under the sponsorship of the Association of British Oceanic Industries. BOTB support was not available to firms participating at exhibitions or conferences held in the UK.

Multi-fibre arrangement

Nicholas Winterton (Macclesfield) asked for details of the agreement reached between the EEC and Thailand on 5 May for a bilateral agreement under the multi-fibre arrangement; and whether this agreement further increased the import penetration of the United Kingdom textile market.

Mr Meacher said that the arrangement, which came into operation on 1 June, provided for community quotas for the calendar year 1977 on certain cotton and synthetic textile fibre fabrics (with a sub-quota for fabrics other than grey and bleached) and regional quotas which for the UK covered a number of knitted under and outer garments including knitted shirts, on which a quota was introduced during the negotiations. There was also a binding consultation clause on a wide range of clothing and on household linen. The agreement covered 85 per cent of UK imports of textiles and clothing from Thailand. The effect on import penetration would depend on a number of factors, including the extent to which the quotas were filled.

Kenneth Clarke (Rushcliffe) asked what general objections had been agreed upon by the EEC in the re-negotiation of the multi-fibre arrangement.

Mr Meacher said the EEC's main objectives were to secure more realistic quota growth rates varying inversely with the degree of import penetration and arrangements for setting overall limits to low cost imports to protect the most sensitive sectors from cumulative disruption.

Trade with North Korea

William Wilson (Coventry South East) asked the Secretary of Trade what proposals he had for increasing United Kingdom trade with North Korea.

Mr Meacher replied that North Korea's very large international debt and recent poor payments record meant that there was at present little scope for any increase in worthwhile exports to that market.

Return on capital

Nicholas Ridley (Cirencester and Tewkesbury) asked the Secretary of State for Industry to estimate the rate of return on capital for all United Kingdom companies at replacement cost after providing for stock appreciation, in 1975 and 1976.

Mr Huckfield said that the figures for all companies were, 1.6 per cent in 1975 and, provisionally, 1.7 per cent in 1976. For industrial and commercial companies, the estimates are 3.4 per cent in 1975 and, provisionally, 3.5 per cent in 1976. He expected profitability to increase as economic conditions improve.

Anti-dumping investigations

Richard Wainwright (Colne Valley) asked how many anti dumping investigations were concluded by the Department of Trade during 1976; how many of these investigations were (a) closed and (b) rejected; and how many led to action under anti-dumping regulations.

Mr Meacher replied that 23 formally announced investigations covering 11 product groups were concluded in 1976. Of those, 12 were closed after undertakings had been received that prices would be increased to an appropriate level. Five cases resulted in the imposition of duties. In three cases it was established that either the goods in question were not being dumped or that there was no material injury to the applicant industry. Three cases were withdrawn at the request of the applicants.

Mr Wainwright also asked for a list of all those actions taken by the Department of Trade under anti-dumping regulations in connection with imports of steel during the last three years.

Ministers

Department of Industry

Secretary of State: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Robert Cryer
Leslie Huckfield

Department of Trade

Secretary of State: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Department of Prices and Consumer Protection

Secretary of State: Roy Hattersley
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

Mr Meacher gave the following information:

Anti-Dumping Duty Imposed

Product	Country of origin	Date of action
Stainless steel bars	Spain	20 May 1977 (replacing provisional charges of 25 October 1976 and 25 January 1977)

Provisional Charges to Duty Imposed (investigations still in progress)

Product	Country of origin	Date of action
Steel reinforcing bars	South Africa	24 December 1976
Non-alloy steel sections	Spain	1 April 1977
Non-alloy steel sections	Japan	7 April 1977
Non-alloy steel flats	Japan	19 May 1977

Other investigations announced (current investigations)

Product	Country of origin	Date of action
Stainless steel billets	Spain	20 May 1977
Steel reinforcing bars	Spain	(revised) April 1977

Price Commission Bill

Ioan Evans (Aberdare) asked the Secretary of State for Prices and Consumer Protection when he would publish proposals for safeguard regulations under clause 9 of the Price Commission Bill.

Mr Hattersley said: 'I am today placing in the libraries of both houses copies of a Consultative Document setting out my proposals for safeguard regulations, which will prescribe minimum levels of profit which companies must not be prevented from earning through the operation of investigations or examinations under the Price Commission Bill. Copies have also been placed in the Vote Office and the Printed Paper Office.' (See also Home News, page 568.)

Tuesday, 14 June

British Leyland

Max Madden (Sowerby) asked the Secretary of State for Industry whether he had received any report from the National Enterprise Board about the trading practices of British Leyland.

Mr Huckfield replied that Lord Ryder's report had been received on 13 June.

Rolls-Royce RB211-524

Lewis Carter-Jones (Eccles) asked the Secretary of State for Industry what action his department took to help promote the Rolls-Royce RB211-524 aero engine which took the world-record weight into the air; what action he had taken since this event; and if he would report any results which he had achieved; and if he would make a statement.

Mr Huckfield replied that while the Department had not taken any special action since this remarkable achievement, the Department of Industry continued to provide launch aid for the development of the engine, and stood ready to provide the company with whatever assistance it could give in support of the sales effort.

Industry Act 1972 assistance

Richard Wainwright (Colne Valley) asked how many applications for financial assistance in the form of grants and loans secured or unsecured under section 7 of the Industry Act 1972 had been received from common ownership enterprises; how many applicants were refused assistance; how many applications were still under consideration; and on what date the last application was made.

Mr Cryer said that only one of the 13 firms who were in membership of the Industrial Common Ownership Movement had applied for assistance under section 7 of the Industry Act 1972 and this application for a grant was successful.

Six other applications had been received from producer co-operatives and two loans and two grants were made. One application was refused and the last application, which was made on 20 April 1977, was under consideration. These figures excluded discussions with potential applicants where the proposal was not pursued or alternative arrangements were made for which statistics were not available.

Intruder alarms

Arnold Shaw (Redbridge, Ilford South) asked the Secretary of State for Prices and Consumer Protection, what action he proposed to take on the report of the Price Commission on intruder alarms.

Mr Hattersley said that the report was published on 31 May and a copy had been placed in the library of the House.

The commission's principal conclusion was that there should be more competition between firms in the intruder alarm industry, although net percentage profit margins were not found to be excessive. Fees and charges were found to have increased at a rate similar to that of the Retail Price Index, but some users, particularly those with small systems, had been faced with increases of up to 100 per cent. The commission found a close association between insurance companies and the industry.

The commission recommended that prospective users should obtain competitive quotations before choosing any particular system, and that they should have more opportunities to buy systems outright rather than renting them. They also recommended clearer contracts to enable customers to be more fully aware of their rights, with rents being shown separately from annual maintenance charges and suitable warranty or guarantee provisions.

The report suggested that customers should be free to select a maintenance company other than the installer if they so wished.

Mr Hattersley added that he was proposing to discuss the commission's findings with the industry and other interested organisations, and would make a further statement when those discussions were completed.

Wednesday, 15 June

Colour coding electrical plugs

Helene Hayman (Welwyn and Hatfield) asked when regulations are to be made to extend beyond 1 July 1977 the labelling requirements prescribed by regulation 5 of the Electrical Appliances (Colour Code) Regulations 1969.

Mr Fraser replied that on 8 June 1977 he laid before parliament the Electrical Appliances (Colour Code) (Amendment) Regulations 1977 which would have the effect of retaining in force indefinitely the requirement that when domestic electrical appliances having three-core mains leads colour coded in accordance with the Electrical Appliances (Colour Code) Regulations 1969, were offered for sale, the leads must bear a label explaining the colour coding of the cores.

Hong Kong textile quotas

Hal Miller (Bromsgrove and Redditch) asked the Secretary of State for Industry whether it remained his policy that the administration of any textile quotas imposed on Hong Kong should continue to be based on export licences issued in Hong Kong by the Hong Kong Government.

Mr Cryer said that this was the case and that quota administration by the Hong Kong Government was specified in the textile agreement with that government which the EEC Commission negotiated on behalf of all member states.

NEDC computer industry working policy

Kenneth Warren (Hastings): asked which United Kingdom companies manufacturing computers were consulted on Government procurement policy in the course of the preparation of the NEDC Computer Industry Working Party draft proposal on the consolidation of the United Kingdom mini-computer industry.

Mr Cryer said that the recent statement on procurement policy by the NEDC Computer Sector Working Party, which made particular reference to minicomputers, was the result of discussions within the Working Party itself. No formal consultations on this topic were held with firms, though a number of companies supplied members to the Working Party and its sub-groups and other companies had previously made representations to the Working Party about procurement policy.

Thursday, 16 June

NEB interest on capital

Michael Grylls (North West Surrey) asked the Secretary of State for Industry if it was his intention that the National Enterprise Board should pay interest in the current financial year on the total public dividend capital paid to it since its formation.

Mr Kaufman replied that in due course he would consider the proposals on this matter which the board were required to make under paragraph 5(3) of Schedule 2 of the Industry Act 1975.

Planning agreements

Kenneth Clarke (Rushcliffe) asked whether the Government proposed to change its policy so that large companies should be compelled to enter into planning agreements and that government assistance to such companies should become available only through planning agreements as recommended in the draft mid-term manifesto of the National Executive Committee of the Labour Party.

Mr Kaufman replied that the planning agreement system remained as provided by the Industry Act 1975.

British Leyland trade practices

Greville Janner (Leicester West) asked the Secretary of State for Industry whether he would publish the report he had received on the trade practices of British Leyland.

Mr Kaufman said that the Government was giving careful consideration to the question of publication of this report.

Friday, 17 June

Equipment for ships

Nicholas Winterton (Macclesfield) asked why the shipbuilding industry is permitted to spend funds from public sources on purchasing equipment overseas when, in all but a few cases, technically suitable equipment is available from United Kingdom manufacturers.

Mr. Kaufman replied that a high proportion of equipment in British-built ships is purchased from domestic suppliers, but the specific requirements of the customer may necessitate individual items of equipment being purchased overseas.

European-based computer industry

Eric Moonman (Basildon) asked the Secretary of State for Industry what discussions he had had in the past six months with the computer industry regarding support for a European-based computer structure and company structure across national boundaries.

Mr Cryer said that none had been held though other forms of European co-operation had been discussed with industry.

Mr Moonman also asked for a statement on the way co-operation should be obtained within EEC countries relating to software and research and development as it affected the computer industry.

Mr Cryer said that the UK was taking an active part in discussions within the EEC on co-operative research and development projects in computer software and applications, following an initiative by the EEC Commission. One project (on matching human organs and blood) was already under way, projects on legal information retrieval and computer-aided design were soon to be launched, and further projects were under consideration. Discussions had yet to begin on the more far-reaching proposals which the EEC Commission had put forward in its four-year programme for the European data-processing industry.

Concorde

Terry Walker (Kingswood) asked what further action the Government would now take to secure the entry of Concorde into New York following the latest ruling in United States Appeal Court.

Mr Clinton Davis said that the ruling was being studied and consideration being given as to how the UK's case should be pursued in the US Courts.

European community news

Substantial increase in aid disbursement agreed

EEC development ministers agreed in principle to the disbursement of 45 million units of account in 1977 as aid to non-associated countries at their meeting in Luxembourg on 16 June, with Judith Hart, Minister for Overseas Development, as president.

This is a substantial increase from the 20 million units of account authorised in 1976. The 1977 disbursement will be an ad hoc arrangement: it has not proved possible yet to obtain total agreement on the form of a regulation which could have established a programme of EEC aid to non-associates on a pluri-annual basis.

Speaking after the meeting, Mrs Hart said that this was a good outcome and represented a considerable shift of attitudes during the actual course of the meeting. Much needed money would now be available in good time for productive use this year. The choice of projects was a matter for the commission but the council had been able to give guidelines upon which to work.

Ten per cent of the allocation, Mrs Hart explained, would be kept back temporarily as a contingency reserve but it would be used this year. There was considerable discussion on the geographical allocation as between Asia and Latin America: the commission had been asked to bear in mind a proportion of three to one respectively and it was accepted that when it came to work out its programme this proportion might be beneficially varied.

The council's decision would hopefully satisfy the European parliament who had expressed concern over the lack of a formal regulation covering aid to non-associates.

Reporting progress on other agenda items, Mrs Hart said that the council had also made progress on food aid, in the light of a commission report which showed that the world food crisis was worsening and that there was a need for a large scale, long term food aid effort to which the community should make an increased contribution. All delegations accepted the validity of the report and the commission had been asked to prepare an increased programme for the next development council.

A unique item on the agenda was a general discussion on rural development, agriculture and food production which took place at the initiative of Judith Hart. This was the first time that development ministers from all member states had had the opportunity of sharing views about the experiences of their governments with the aim of achieving greater degrees of harmonisation and co-ordination of their individual policies and practices. It was agreed that there was scope for further expert discussion to be arranged by the commission, additional to the regular European development fund advisory meetings and including non-official experts and the developing countries themselves.

Environment ministers agree on titanium dioxide directive

Broad agreement was reached at the meeting of EEC environment ministers in Luxembourg on 14 June on a draft directive on titanium dioxide and was referred to the committee of permanent representatives to further progress.

Ministers also reached agreement on a decision on the exchange of information on water and a measure of agreement was reached on a draft decision on the community's accession to the Helsinki convention on the protection of the Baltic.

The draft directive on toxic wastes was almost agreed except for one matter concerning the technical progress committee which was referred back to the committee of permanent representatives. Discussions were also held on the draft directive on wood pulp which was also referred back to the committee of permanent representatives.

Considerable UK gain from social fund

Since joining the community in 1973, the UK has been allocated £140 million from the European social fund, about 27 per cent of the total allocations in that period. There could be no doubt that the UK had gained considerably from the fund during membership.

Under-Secretary of State for Employment, John Grant made this point at the beginning of a Commons debate on the commission's proposals for a review of the social fund* on 13 June. Mr Grant explained that the bulk of assistance that had been received by the UK had been for training and resettlement activities in assisted areas. The UK had a clear interest in securing that the fund's efforts should continue to be directed mainly in helping regions in difficulties.

*Com (77) 90 (see *Trade and Industry* 27 May, page 391).

Most UK applications were in respect of overall national programmes such as Tops, for training unemployed people in the assisted areas of Great Britain, for emergency measures for the training of young people, and for similar schemes in Northern Ireland. It was one of the UK's primary aims in the review to secure the continuation of fund support for overall national programmes.

After outlining the commission's proposals for a review of the social fund, Mr Grant said that it was one of the UK presidency aims to obtain agreement on the basic text at the social affairs council on 28 June.

The changes proposed were of considerable importance, he said and allowing for certain reservations which he had outlined earlier they would do much to ensure a better operation and a better use of the social fund to help to improve job prospects for workers throughout the community.

Energy ministers discuss nuclear policy

Replying to a question in the House of Lords on 20 June Lord Strabolgi said that the second meeting of the EEC energy council during the UK presidency took place in Luxembourg on 14 June.

The council, he said, had a useful discussion on nuclear energy questions, identifying several points on which further study by the community could help to develop nuclear energy with the maximum degree of safety and public acceptability.

In a discussion on key coal proposals, the UK stressed the need for community preference. No agreement was reached on a proposal to aid investment in coal fired power stations, but the concept was remitted for further study.

In a discussion on refinery surpluses, there was a broad consensus on the external aspects but not on the extent to which the community should discuss any national plans for new construction, albeit on a non-binding basis; the UK's reserve was explained; the question would be studied further.

Trade policy advantages for UK in EEC

Membership of the European community has been an advantage to the UK in trade policy terms, Edmund Dell, Secretary of State for Trade told the German Chamber of Industry and Commerce on 15 June.

It was undoubtedly of advantage that the

UK had been able to formulate policy in respect of the multifibre arrangement within the context of the European community; and Mr Dell said that he expected it to be of advantage to Britain that it was within the European community that Britain was now working out policy governing relations with the third world 'both in respect of the access we can give and the degree of reciprocity we can expect from those in the developing world who are today highly competitive producers'.

Mr Dell said that, in trade terms, British membership of the European community had also been an advantage to the European community. The UK had become a major market for German products and for the community as a whole a very big food market.

Mr Dell went on to identify three problem areas for the UK. The level of European food prices, the need for free trade in services and the UK's deficit with the community in manufactured goods.

On the first problem of European food prices, he said that as a major purchaser of European food the UK had a strong interest in avoiding unnecessarily high prices. That certainly did not exclude consideration of the interests of the producer within Europe. Mr Dell said that he believed there was a time some years ago in UK agricultural and food policy when the rights of the consumer weighed too much relative to those of the producer. He regarded the maintenance of a healthy agricultural industry as a sensible object of policy. But there was a balance. 'For myself it is not the principles of the common agricultural policy that are objectionable. It is the methods which, despite everything that has been done, still do not take enough care of the interests of the consumer.'

On the UK's service industries, he said that the UK expected there to exist within the community as free a trade in services as existed in goods.

Giving insurance as an example, Mr Dell said that Britain's insurance industry was one of the strongest supporters of UK entry to the European community. Two-thirds of its total premium income came from overseas; it was international in outlook, enterprising and competitive and it fully expected that membership of the community, which provided only a modest 12 per cent of its business, would lead quickly to liberalisation and expansion of insurance activities between member states.

The reality had been very different. Progress towards a common market in insurance had been disappointingly slow due to negative and restrictive attitudes adopted by some member states. 'I regret to say that one of the member states to which I am referring is the Federal Republic of Germany', Mr Dell pointed out.

The UK wished to encourage a genuine common market in insurance and was willing to share the expertise which UK industry had acquired from many years of international operations. Greater liberalisation would in Britain's view benefit not only the UK but people in the community as a whole. It would serve the consumer – and this was an advantage which businessmen might well consider – by providing a wider choice of insurance, greater flexibility and more competition.

'If we in the United Kingdom are expected to support and fight for freer trade in goods, we cannot be expected to accept the situation when one of our major industries continues to be denied the opportunities to which membership of the community entitles us.' In March this year the council of economic and finance ministers had adopted a resolution intended to speed up the adoption of directives in the field of insurance, Mr Dell pointed out. The UK was doing its best to further the objects of this resolution. He hoped that the UK might look to German businessmen for support by persuading their own authorities to adopt a more positive attitude towards liberalisation and insurance.

New Customs and Excise tariff

HM Customs and Excise have announced that with effect from 1 July 1977, a new edition of HM Customs and Excise tariff becomes operative and on that date all tariff pages dated earlier than 1/7/77 become obsolete.

Not all the information needed to complete the 1/7/77 tariff was available at the time of going to press. Consequently, a series of supplementing amendments also operative 1/7/77 will be issued. These will be numbered 1, 2, 3 etc and run up to about no. 14. Users of the tariff are, however, advised that all numbers from 1 to (at least) 14 are being used, although some amendments will arrive out of sequence.

Below is a list of the 1/7/77 supplements with their content. Those marked with an asterisk are particularly subject to delay:

Amendment	Content
1	Efta – preferential rates
2*	Cyprus – preferential rates
3	Maghreb (Morocco, Tunisia, Algeria) – preferential rates
4	Israel – preferential rates
5	Greece – preferential rates
6*	Turkey – preferential rates
7*	Malta – preferential rates
8	Aircraft suspensions and ACP/OCT preferential rates
9*	Mashraq (Egypt, Jordan, Syria, Lebanon) – preferential rates
10*	Faroe Islands – preferential rates
11	Anti-dumping duties. Excise duties and drawbacks
12	'Rounding-up' amendment for late modifications

Additionally, amendments nos. 13 and 14 will be reserved for (a) Spain – preferential rates, and (b) suspensions (other than aircraft suspensions), respectively.

Tobacco. The rates printed in chapter 24 of the main edition of the tariff have been superseded. A replacement chapter 24 will be issued (probably with amendment 12).

The above amendments will be issued current subscribers as part of the subscription service.

Trade with Efta countries from July

The tariff-dismantling period for most goods covered by the EEC trade agreements with the Efta countries ends on 30 June 1977. Thereafter the trade in these goods in both directions between the EEC and Efta countries will be duty free, provided that the goods satisfy the origin and consignment rules of the agreements.

This means that for these goods the special provisions (article 25.1 of the origin protocol) which allow duty free trade between the UK (and Denmark) and the Efta countries to continue during the tariff-dismantling periods – the so called ex-Efta treatment – will lapse. To qualify for duty free entry it will no longer be necessary for these goods to satisfy the special conditions of article 25.1; it will be sufficient if they satisfy the normal origin rules. It follows that for these goods the endorsement 'article 25.1 satisfied' on movement certificates (EUR 1 and EUR 2) will no longer be required and should not be made.

For some goods covered by the agreements however the tariff dismantling periods extend beyond 30 June 1977. For the goods listed on pages 583-4 (see *Trade and Industry* 27 May, page 392), Efta countries will continue to give more favourable treatment (normally duty free entry) to UK and Danish goods than to similar goods from other EEC countries, provided that the provisions of article 25.1 are satisfied and movement certificates EUR 1 or EUR 2 are endorsed to this effect. No goods are listed for Portugal or Iceland, as under the agreements with those countries goods from all EEC countries will be given equal tariff treatment as from 1 July 1977.

Where, for the goods listed, UK and Danish goods do not satisfy the provisions of article 25.1 but do satisfy the normal origin rules of the agreements, they will qualify for entry to Efta countries at the same preferential rates as apply to similar goods from other EEC countries. In such cases movement certificates should not, of course, be endorsed 'article 25.1 satisfied'.

Inquiries should be made to the Department of Trade (General Division), Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ, tel. 01-215 5750 or, on questions of documentation and procedures, to HM Customs and Excise (International Division E, Branch 4), Adelaide House, London Bridge, London EC4R 9DB, tel. 01-626 1515.

More community news

Information on European community matters and about member states can often be found in other sections of *Trade and Industry*. For this week's additional news, turn to the following pages:

Parliament
Multi-fibre agreement 578
European based computer industry 579

Overseas trade news
Footwear exports up – Meacher 612

Notices to importers
1619: New open general licences 615
1620: T-shirts from India 615
1621: Shirts from Pakistan 615

Exhibitions
Modernisation boosts shutter market 616
'Happy Drupa' for UK exhibitors 617

Statistics
Registration of British, community and foreign films 650

New legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is now published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757, ext. 7174/482/408. Other information may be obtained from the reference point given at the end of the item.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities*.

General. Regulation (EEC) 1123/77 on transitional measures concerning the application of monetary compensatory amounts to certain products not included in annex II (*Official Journal* L134, 28 May 1977).

Sugar. Regulation (EEC) 1110/77 amending regulation (EEC) 3330/74 on the common organisation of the market in sugar (*Official Journal* L134, 28 May 1977).

Regulation (EEC) 1112/77 fixing, for the 1977/78 sugar year, the sugar prices, the standard quality of beet and the coefficient for calculating the maximum quota (*Official Journal* L134, 28 May 1977).

Regulation (EEC) 1113/77 fixing, for the 1977/78 sugar year, the derived intervention prices, the intervention price for raw beet sugar, the minimum prices for beet, the threshold prices, the maximum amount of the production levy and the amount of the repayment to offset storage costs (*Official Journal* L134, 28 May 1977).

Processed agricultural products. Regulation (EEC) 1111/77 laying down common provisions for isoglucose (*Official Journal* L134, 28 May 1977).

Regulation (EEC) 1127/77 repealing regulation (EEC) 3348/73 concerning the levying of a tax on the exportation of certain goods covered by regulation (EEC) 1059/69 (*Official Journal* L134, 28 May 1977).

Cereals and rice. Regulation (EEC) 1124/77 redefining the destination zones for export refunds or levies and for certain export licences for cereals and rice (*Official Journal* L134, 28 May 1977).

Regulation (EEC) 1125/77 amending for the eleventh time regulation (EEC) 2042/75 on special detailed rules for the application of the system of import and export licences for cereals and rice. (*Official Journal* L134. 28 May 1977).

The *Official Journal* L136, 2 June 1977 contains the texts of the following regulations:

Regulation (EEC) 1151/77 amending regulation (EEC) 2727/75 on the common organisation of the market in cereals

Regulation (EEC) 1152/77 fixing cereal prices for the 1977/78 marketing year

Regulation (EEC) 1153/77 concerning the list of community regions which qualify for aid in respect of durum wheat and fixing the amount of such aid

Regulation (EEC) 1154/77 fixing, for the 1977/78 marketing year, the monthly price increases for cereals, wheat and rye flour and wheat groats and meal

Regulation (EEC) 1155/77 laying down the minimum requirements for common wheat intended for bread-making

Regulation (EEC) 1156/77 supplementing regulation (EEC) 2731/75 fixing standard qualities for common wheat, rye, barley, maize and durum wheat

Regulation (EEC) 1157/77 amending regulation (EEC) 2749/75 on the reduction in the levy applicable to certain imports of feed grain into Italy as from the 1973/74 marketing year

Regulation (EEC) 1158/77 amending regulation (EEC) 1418/76 on the common organisation of the market in rice

Regulation (EEC) 1159/77 fixing rice prices for the 1977/78 marketing year

Regulation (EEC) 1160/77 fixing, for the 1977/78 marketing year, the monthly price increases for paddy rice and husked rice

Regulation (EEC) 1161/77 fixing, for the 1977/78 marketing year, the protective amount to be included in the threshold price for wholly milled rice.

Seeds. Regulation (EEC) 1167/77 amending the annex to regulation (EEC) 2358/71 on the common organisation of the market in seeds. This adds the following to the annex to regulation (EEC) 2358/71:

CCT heading no.	Description of goods	
ex 12.01 A	Linum usitassimum L. partim	Linseed

(*Official Journal* L137, 3 June 1977).

Regulation (EEC) 1168/77 fixing, for the 1977/78 marketing year, the amounts of aid granted for seeds (*Official Journal* L137, 3 June 1977).

Tobacco. Regulation (EEC) 1169/77 fixing, for the 1977 harvest, the norm and intervention prices and the premiums granted to purchasers of leaf tobacco, and the derived intervention prices for baled tobacco (*Official Journal* L137, 3 June 1977).

Hops. Regulation (EEC) 1170/77 amending regulation (EEC) 1696/71 on the common organisation of the market in hops (*Official Journal* L137, 3 June 1977).

Wine. Regulation (EEC) 1171/77 fixing, for the period 16 December 1977 to 15 December 1978, the guide prices for wine (*Official Journal* L137, 3 June 1977).

Pigs and pigmeat. Regulation (EEC) 1190/77 amending regulation (EEC) 801/77 on special conditions for the granting of private storage aid for pigmeat (*Official Journal* L138, 4 June 1977).

Fruit and vegetables. Corrigendum. The *Official Journal* L136, 2 June 1977, contains the following correction to regulation (EEC) 1045/77 (published in *Official Journal* L125, 19 May 1977) laying down detailed rules for the application of measures to encourage the marketing of products processed from lemons:

Page 24, article 1(2):

for: 'contracts may be concluded up to 30 June 1977',

read: 'contracts may be concluded up to 31 July 1977'.

Commercial policy

The *Official Journal of the European Communities* L137, 3 June 1977, contains the text of regulation (EEC) 1176/77 submitting to authorisation imports into the UK of certain articles of clothing originating in Macao. This applies to garments falling within CCT headings 61.01 and 61.02.

Further information: Department of Industry, Chemicals and Textiles Division, Millbank Tower, Millbank, London SW1P 4QU, tel. 01-211 4124

Customs regulations

Goods carried by sea. The *Official Journal of the European Communities* L124, 18 May 1977, contains the text of regulation (EEC) 1025/77 specifying, for purposes of article 6 (2) of regulation (EEC) 803/68 on the valuation of goods for customs purposes, the place of introduction for goods carried by sea.

Air transport costs. The *Official Journal of the European Communities* L127, 23 May 1977, contains the text of regulation (EEC) 1033/77 on the air transport costs to be included in the value for customs purposes.

List V of the annex to regulation (EEC) 1033/77 which sets out the per cent of air costs to be included in the value for customs purposes of goods imported into the UK will be published by HM Customs and Excise as notice 252A at the end of June. Copies of the above *Official Journals* may be obtained from HMSO: no. L124 price 35p plus postage and L127 price 70p plus postage.

Further information on regulations (EEC) 1025/77 and (EEC) 1033/77 may be obtained from HM Customs and Excise, Valuation Division, Section N, Vintry House, Queen Street Place, London EC4R 1BQ, tel. 01-626 1515 ext. 2770.

Imports from non-member states

The *Official Journal of the European Communities* L138, 4 June 1977 contains the texts of the following decisions:

Decision 77/362/EEC authorising France not to apply community treatment to unbleached or bleached woven fabrics of cotton or synthetic textile fibres, falling within heading no. ex 55.09 and subheading 56.07 ex A of the common customs tariff, originating in the Republic of Korea and in free circulation in the other member states.

Decision 77/366/EEC authorising Belgium, Luxembourg and the Netherlands not to apply community treatment to drawn or blown glass, falling within heading no. ex 70.05 of the common customs tariff, originating in Bulgaria and in free circulation in the other member states.

Exports to Efta: customs notice 810

In *Trade and Industry* 27 May page 392 the reference to customs notice 810 may have been misleading. The latest version of the notice is dated July 1976 and was distributed in October.

Preferential exports to Efta countries

Goods to which the provisions of article 25.1 will apply, from 1 July 1977 until the dates shown, to United Kingdom exports to Efta countries are given below. The tariff headings quoted are those of the customs tariff of the Efta country concerned.

Austria

Until 1 January 1980

ex 56.01
Viscose textile fibres, based on ammoniacal copper oxide and acetate (cellulose wool); textile fibres based on alginates or casein

ex 56.02
Continuous filament tow for the manufacture of regenerated fibres (discontinuous)

ex 73.02
Ferro-alloys, excluding ferro-nickel and products covered by the ECSC Treaty

73.15
All goods

ex 76.01
Unwrought aluminium

ex 78.01
Unwrought lead

ex 79.01
Unwrought zinc

ex 81.01
Tungsten (wolfram), unwrought or wrought, and articles thereof, but not including tungsten unworked, in pigs, bars, cast or sintered rods, powder or pellets; tungsten waste and scrap

ex 81.02
Molybdenum, unworked, in pigs, bars, cast or sintered rods, powder or pellets; other molybdenum, but not including molybdenum waste and scrap

ex 81.04
Antimony, unwrought or wrought; antimony waste and scrap

Until 1 January 1984

All goods: 48.02, 48.04 to 48.06 inclusive, 48.10, 48.12, 48.14, 48.16 to 48.20 inclusive, 49.01 to 49.11 inclusive

ex 48.01
All goods except straw paper and filter paper

ex 48.03
All goods except genuine parchment or greaseproof paper

ex 48.07
All goods except baryta photographic paper (but not including blueprint paper), transfer paper, indigo paper, shellac paper, and unsensitised photographic paper

ex 48.11
All goods except window transparencies of paper

ex 48.13
All goods except indigo paper cut to size

ex 48.15
All goods except filter paper cut into round shape or folded

ex 48.21
All goods except cards for Jacquard machines

Finland

Until 1 January 1981

All goods: 28.54, 40.09, 40.13, 41.08, 42.02, 58.02, 64.01, 69.10, 69.11, 69.12, 70.13, 73.38, 76.15, 82.09 to 82.14 inclusive, 84.24, 85.18, 97.05

ex 84.13
Furnace burners for liquid fuel

ex 84.23
Machinery of this heading mounted as tractor-type chassis

ex 84.25
Combine harvester-threshers

ex 85.11
Electric welding, brazing and soldering machines and apparatus and similar electric machines and apparatus for cutting; parts thereof, with the exception of electric welding machines for artificial plastic materials, with induction and dielectric heating

ex 94.01
Unstuffed or uncovered chairs and other seats (other than those falling within heading no. 94.02), whether or not convertible into beds, and parts thereof, with the exception of those of wood

ex 94.03
Other furniture and parts thereof, with the exception of those of wood

Until 1 January 1985

All goods: 32.09, 36.01 to 36.04 inclusive, 39.03, 39.07, 40.10, 40.11, 40.14, 42.03, 43.03, 53.10, 53.11, 54.05, 55.06, 56.06, 57.10, 58.04, 59.07, 59.13, 59.15, 60.01, 60.03 to 60.05 inclusive, 61.01 to 61.09 inclusive, 62.01, 62.02, 62.04, 64.02, 68.08, 69.07, 69.08, 70.05 to 70.07 inclusive, 82.01 to 82.08 inclusive, 82.15, 83.07, 84.06, 84.15, 84.40, 84.47, 84.61, 85.01, 85.03, 85.12, 85.13, 85.15, 85.17, 85.20, 85.23, 85.25, 85.28, 87.10, 87.14, 90.24 to 90.29 inclusive, 94.02

ex 29.02
Trichlorethylene and tetrachlorethylene

ex 29.07
Pentachlorphenol and pentachlorphenolate

ex 39.01
Worked products (artificial sausage casings; reflecting products incorporating small spherical glass grains (ballotini), coated or not with adhesive material, whether or not surface-treated; film and foil (whether or not tubular); plates, sheets and strips; monofil, tubes, pipes and rods)

ex 39.02
Worked products (artificial sausage casings; reflecting products incorporating small spherical glass grains (ballotini), coated or not with adhesive material; strips and other products, coated with adhesive material, whether or not surface-treated; film (whether or not tubular); plates, sheets and foil; monofil. tubes, pipes and rods)

ex 39.04
Worked products (artificial sausage casings, etc)

ex 41.02
Bovine cattle leather (including buffalo leather) and equine leather, except leather falling within heading no. 41.06, 41.07 or 41.08, with the exception o fonly pre-tanned leather, for subsequent tanning

ex 41.03
Sheep and lamb skin leather, except leather falling within heading no. 41.06, 41.07 or 41.08, with the exception of only pre-tanned leather, for subsequent tanning

ex 41.04
Goat and kid-skin leather, except leather falling within heading no. 41.06, 41.07 or 41.08, with the exception of only pre-tanned leather, for subsequent tanning

ex 43.02
Furskins, not assembled in plates, crosses and similar forms

ex 51.01
Sewing yarn and textured yarn of synthetic textile fibres (continuous), not put up for retail sale, other than textured yarn of regenerated textile fibres (continuous), not put up for retail sale

ex 51.04
Woven fabrics of man-made fibres (continuous), including woven fabrics of monofil or strip of heading no. 51.01 or 51.02, with the exception of cord fabrics

ex 55.05
Sewing thread of cotton, not put up for retail sale

ex 55.09
Other woven fabrics of cotton, with the exception of cord fabrics

ex 56.05
Sewing thread of man-made fibres (discontinuous or waste), not put up for retail sale

ex 56.07
Woven fabrics of man-made fibres (discontinuous or waste), with the exception of cord fabrics

ex 59.02
Felt and articles of felt, whether or not impregnated or coated, with the exception of felt impregnated or coated with asphalt, tar or similar substances

ex 59.03
Bonded fibre fabrics, similar bonded yarn fabrics, and articles of such fabrics, whether or not impregnated or coated, with the exception of bonded fibre fabrics and similar bonded yarn fabrics, in the length, impregnated or coated with asphalt, tar or similar substances

ex 59.08
Textile fabrics impregnated, coated, covered or laminated with preparations of cellulose derivatives or of other artificial plastic materials, with the exception of insulation tape (whether or not covered with adhesive), other tape covered with adhesive, of a width not exceeding 5 cm, insulating sheaths for electrical purposes, and tape for use in the boot and shoe industry

ex 59.10
Floor coverings consisting of a coating applied on a textile base, cut to shape or not

ex 59.11
Rubberised textile fabrics, other than rubberised knitted or crocheted goods, with the exception of cord fabrics and insulation tape (whether or not covered with adhesive), other tape covered with adhesive, of a width not exceeding 5 cm, insulating sheaths for electrical purposes, and tape for use in the boot and shoe industry

ex 68.12
Slabs and pipes of asbestos-cement or cellulose fibre-cement or the like

ex 84.23
Machinery of this heading not mounted on tractor-type chassis

ex 85.04
Lead-acid accumulators and plates thereof

ex 85.19
Electrical apparatus for making and breaking electrical circuits; fuses, including sockets and connecting pieces therefor, for operating voltages of 600 volts or less; wall outlet sockets and the like, and plugs therefor; apparatus for making connections to or in electrical circuits for operating voltages of 600 volts or less (with the exception of holders for electric filament lamps and electric discharge lamps and tubes); variable resistors; switchboards and control panels

ex 87.02
Public-service-type passenger vehicles (for example motor buses, coaches), diesel engined; new lorries of a total weight of 10 metric tons or more, diesel engined; chassis fitted with cabs and engines

ex 87.04
Chassis fitted with engines for public-service passenger vehicles (for example motorbuses, coaches) or for lorries

ex 87.07
Works trucks, mechanically propelled, of the types used in factories, warehouses, dock areas or airports for short distance transport or handling of goods (for example, platform trucks, fork-lift trucks and straddle carriers); tractors of the type used on railway station platforms; parts of the foregoing vehicles, with the exception of electrically operated trucks and tractors

ex 87.09
Auto-cycles and cycles fitted with an auxiliary motor

Norway

Until 1 January 1980

All goods: 33.06, 36.01 to 36.03 inclusive, 39.05, 39.06, 40.09, 40.10, 58.02, 64.02, 69.11, 69.12, 70.05 to 70.08 inclusive, 70.14, 82.04, 82.07, 82.09, 82.14, 83.01, 83.02, 84.61, 85.04, 85.23, 85.25, 85.26, 87.09, 87.10, 87.13, 92.11, 96.02, 98.01, 98.02

ex 39.01
Products of this heading, other than paper or paperboard laminates and ion exchangers

ex 39.02
Products of this heading, other than ion exchangers and products of polypropylene and polyacrylic

ex 39.03
Regenerated cellulose, cellulose nitrate, cellulose acetate and other cellulose esters, cellulose ethers and other chemical derivatives of cellulose, plasticised or not, excluding waste and scrap, plates, tubes (other than artificial sausage casings), pipes, rods, sticks and profile shapes; vulcanised fibre, excluding products with unpainted or unlacquered surface

ex 39.04
Artificial sausage casings

ex 39.07
Articles of this heading, excluding spinning cops, bobbins and spools, spinning cans, shoe trees and lasts, machine joints and gaskets

ex 40.11
Products of this heading, excluding pneumatic tyres for motorcycles, motor scooters and tractors

ex 40.14
Products of this heading, excluding machine joints and gaskets

ex 48.21
Articles of this heading, excluding paper and paperboard cards for use with Jacquard and similar machines, edge protectors for paper rolls, coffee filters and the like, artificial sausage casings, tubes and pipes, spinning cans and cigarette filters

ex 59.10
Products of this heading, excluding linoleum

ex 70.09
Glass mirrors (including rear-view windows), framed or backed, excluding products which are unbevelled

ex 70.13
Products of this heading, excluding articles of crystal containing 24 per cent or more lead oxides and of a density of 2.9 or above, hand-made or mechanically made, cut or not, decorated or not

ex 73.17
Finned tubes and pipes, soil pipes, of cast iron

ex 73.18
Tubes and pipes and blanks therefore, of iron or steel, with riveted or folded edges, or of a wall thickness of more than 1.8 mm excluding seamless tubes and pipes

ex 73.20
Tubes and pipe fittings (for example, joints, elbows, unions, and flanges), of cast iron, other than malleable

ex 73.38
Articles of this heading, excluding those of cast iron

ex 76.02
Products of this heading, excluding wire and wire rod of any cross-section

ex 76.03
Products of this heading, excluding corrugated sheets

ex 84.15
Freezers, combined refrigerators and freezers

ex 84.47
Machine-tools of this heading, excluding pneumatic machine-tools

ex 85.12
Electric hairdressing appliances (for example, hair dryers, hair curlers, curling tong heaters) and electric heating resistors (not of carbon) for such articles and for electric smoothing irons

ex 87.05
Bodies (including cabs) for the motor vehicles falling within heading no. 87.02 or 87.03

ex 90.28
Echo sounding instruments and ultrasonic sounding or detecting equipment

ex 94.03
Other furniture and parts thereof, of steel, nickel- or chromium-plated

Until 1 January 1984

All goods: 53.10, 54.05, 55.06, 55.08, 56.06, 58.06, 58.07, 58.09, 59.03, 59.13, 59.15, 60.01, 60.03, to 60.05 inclusive, 61.02 to 61.04 inclusive, 61.07, 61.09, 62.01, 62.02, 64.01

ex 51.04
Fabrics, other than cord fabrics and those for use in the industry for production of clothing

ex 53.11
Fabrics, other than those for use in the industry for production of clothing

ex 55.09
Fabrics, other than those for use in the industry for production of clothing
ex 56.07
Fabrics, other than those for use in the industry for production of clothing
ex 58.04
Fabrics, other than those for use in the industry for production of clothing
ex 58.05
Fabrics, other than those of jute
ex 59.01
Wadding and articles of wadding, excluding cigarette filters
ex 59.02
Products of this heading, excluding felt of vegetable fibres (neither impregnated nor coated) and felt for technical purposes
ex 59.04
Products of this heading, excluding rope yarn of flax, hemp or sisal, not plaited or containing continuous man-made textile fibres
ex 59.08
Fabrics, other than those intended for the manufacture of toe caps and for use in the industry for production of clothing
ex 60.01
Fabrics, other than those for use in the industry for production of clothing
ex 61.01
Men's and boys' outer garments, excluding divers' suits
ex 85.15
Receivers for colour television

Sweden

Until 1 January 1980
All goods: 73.15
73.12, 73.13, 73.18. Only some of the goods of these headings are covered. Further details may be obtained from the Department of Trade, General Division, Kingsgate House, 66-74 Victoria Street, London SW1 (tel. 01-215 5750) or from HM Customs and Excise, International Customs Division E, Branch 4, Adelaide House, London Bridge, London EC4 (tel. 01-626 1515)

Switzerland

Until 1 January 1982
All goods: 44.18

Until 1 January 1984
All goods: 48.01, 48.07
ex 48.03
Products of this heading, other than greaseproof paper weighing 30 gms or less per square metre, of a natural brown colour, subject to proof of use in the manufacture of condensers
ex 48.15
Products of this heading, other than filter paper, folded or not, and greaseproof paper weighing 30 gms or less per square metre, of a natural brown colour, subject to proof of use in the manufacture of condensers
ex 48.21
Tablecloths, serviettes and handkerchiefs

Iceland

Nil

Portugal

Nil

Community transit: Anglo-Irish and Anglo-Danish trade after the transitional period

Anglo-Irish traffic

The ending of the transitional period following this country's accession to the EEC means that the present preferential duty rates allowed under the Anglo-Irish free trade agreement (Aifta) and the Commonwealth preference provisions will cease. Preferential treatment for goods traded between the UK and the Republic of Ireland will then be governed by the concept of 'free circulation' and will normally require the use of the appropriate community transit documents.

This change in itself simplifies procedure in that the criteria for establishing the origin of goods for the purposes of Aifta or Commonwealth preference are relatively complex, whereas it is basically simple to determine whether or not goods are in free circulation. However, as a further simplification, advantage has been taken of article 6 of EEC regulation 542/69 to reach agreement with the Republic of Ireland so as to avoid the use of community transit documents for certain straightforward transactions. The agreement applies to free circulation goods for which customs export entry is made before exportation and allows a certified copy of the export entry to be used as evidence of free circulation status. It does not cover movements of a kind for which use of the full procedure forms (forms T1, T2 or T3) is obligatory or CAP goods subject to the payment of accession or monetary compensatory amounts.

For exports from the UK to the Republic of Ireland, the special arrangements can be used only for traffic across the land boundary between Northern Ireland and the republic in circumstances where use of the 'article 41' forms T2 or T3 would otherwise be appropriate. For exports from the Republic of Ireland the facility may be used for any direct movement to the UK.

Anglo-Danish traffic

At the time of the accession of the UK and Denmark to the EEC special arrangements came into operation to maintain, as far as possible, during the transitional period the free trade which had previously existed between the two new member states when they were members of Efta.

During the transitional period a bi-lateral agreement has operated between the UK and Denmark which has dispensed with the requirement for community transit documentation for goods traded directly between the two countries which are the subject of a valid declaration on origin and drawback as laid down in the Anglo-Danish arrangements. The relaxation has not applied in cases where the use of the full CT procedure is compulsory under community rules and the use of CT documents of T3 status has been required to establish the entitlement to 'M' rates of duty of goods not admitted free under the Anglo-Danish arrangements.

On 1 July the Anglo-Danish arrangements will cease to apply to all goods except horticultural goods listed in amendment no. 40 of the 1976 edition of the UK tariff (part 5 special of the 1 July 1977 edition). This will mean that from that date preferential 'E' rates of duty will cease to apply to imports from Denmark for all but the excepted goods and will be replaced by 'M' rates of duty for which the only acceptable evidence of entitlement is the production of the appropriate CT document.

Discussions are currently taking place with the Danish authorities regarding the ending of the Anglo-Danish arrangements. Pending the outcome of these discussions, in the absence of the appropriate CT documents Anglo-Danish invoice declarations for goods which previously would have qualified for duty free admission under the Anglo-Danish arrangements may be accepted as evidence that they are entitled to 'M' rates of duty.

For goods exported to Denmark which are no longer covered by the Anglo-Danish arrangements traders are advised to replace invoice declarations with the appropriate CT documents.

It should be noted that the arrangements for the continuing use of CT documents of T3 status during the remainder of the transitional period apply equally to Anglo-Danish trade as to trade with other member states.

New customs notice on EEC preferences for imports

Information about United Kingdom import procedures given in customs notice no. 826, which covers EEC preferences generally except for those concerning Greece and Turkey, supersedes that contained in earlier notices issued by Customs about individual EEC preferential trade agreements. The notice explain the procedure for claiming the preferential treatment which is granted by the EEC to goods which originate in, and are consigned from, a preference country.

Copies may be obtained from Collectors of Customs and Excise or from HM Customs and Excise, King's Beam House, Mark Lane, London EC3R 7HE.

Valuation of goods imported by air after 30 June

In general, after 30 June 1977 goods subject to *ad valorem* duty are to be valued as if delivered to the buyer at the place of introduction into the customs territory of the community. In the case of goods imported by air the 'place of introduction' is where the frontier of the customs territory is crossed, which means that virtually all expenses relative to air freight after crossing the community frontier are not part of the value for duty.

Regulation (EEC) no 1033/77 published on 23 May 1977 sets out the percentage of the air freight charge to be included in the value for duty. The relevant table showing airports of departure in third countries and selected airports of arrival in the UK together with percentages of the air transport costs to be included in the dutiable value, is being reproduced in a new notice no 252A which will be available by the end of June. In the meantime further information can be obtained from the local Collector of Customs and Excise or from HM Customs and Excise, King's Beam House, Mark Lane, London EC3R 7HE.

Temporary suspension of the CCT

The Department of Trade has been notified by the EEC commission of an urgent request for a temporary reduction to 10 per cent in the CCT on concentrated orange juice falling within tariff heading 20.07 BII a)1. The product is defined as unfermented orange

juice without added alcohol, whether or not containing added sugar, of a specific gravity of 1.33 or less at 15°C and of a value exceeding 30 UA per 100 kg net weight.

If any UK interests consider that a reduction in the duty would be detrimental to their interests they should inform the Department in writing giving reasons not later than 8 July. Representations should be sent to the Department of Trade, General Division, Room 332, Kingsgate House, 66-74 Victoria Street, London SW1E 6SJ. Inquiries: 01-215 3576.

Generalised Tariff Preference Scheme (GSP): restoration of normal duties

Trade and Industry of 25 February, 18 March, 22 April and 13 May gave details of GSP tariff quotas exhausted and GSP ceilings reached up to 30 April. HM Customs have stated that the position on the restoration of normal duties for the month ending 31 May is as follows (the Customs' quota reference* is given in brackets after the description of goods):

I Tariff quotas and special ceilings

Tariff heading/ description of goods	Date UK quota share exhausted	Community butoir or where applicable UK maximum cumulative amount (ma) reached: duty re-imposed
55.05A (S/C) Cotton yarn, not put up for retail sale: Multiple or cabled, finished in balls or on cards, reels, tubes or similar supports, of a weight (including support) not exceeding 900 g (6194)	31.5.77	Yugoslavia
55.08 (S/C) Terry towelling and similar terry fabrics of cotton (6267)	27.5.77	Yugoslavia

* See HM Customs Tariff, Part 11.
S/C Denotes Special Ceiling.

II Ceilings

Tariff heading/ description of goods	Date of restoration of duties: From all sources	From particular sources (inner ceilings)
40.11 Rubber tyres, tyre cases, interchangeable tyre treads, inner tubes and tyre flaps for wheels of all kinds		2.5.77 Yugoslavia 15.5.77 South Korea
41.05 BII Other kinds of leather, except leather falling within heading no. 41.06, 41.07 or 41.08: Other, other		27.5.77 Yugoslavia
44.13 Wood, planed, tongued, grooved, but not further manufactured		30.5.77 Brazil
46.02 Plaiting materials		27.5.77 South Korea
48.09 Building board		30.5.77 Brazil
61.10 Gloves, mittens, mitts, stockings, socks and sockettes not being knitted or crocheted goods		31.5.77 Hong Kong
70.12 Glass inners for vacuum flasks or for other vacuum vessels	21.5.77	28.2.77 Yugoslavia
70.14 B Illuminating glassware: other		21.5.77 South Korea†
82.09 Knives with cutting blades other than knives falling within heading no. 82.06		15.5.77 Hong Kong

† Contrary to earlier information GSP preference was still available for goods of this tariff heading from South Korea at 31 May. Inquiries regarding possible refund of duty overpaid should be directed to the Customs office at which the goods were entered for home use.

Inquiries about current availability of preferences may be made to HM Customs and Excise, Central Tariff Quota Registration Unit, King's Beam House, Mark Lane, London EC3R 7HE, tel. 01-626 1515 ext. 2570.

Tariff quotas 1977 – exhaustions

HM Customs have stated that the United Kingdom's share of the following EEC tariff quota has been exhausted:

UK tariff heading	Description of goods	HM Customs serial no. (part 11 of the UK tariff)
73.02 D	Ferro silico manganese	4517

The following United Kingdom's tariff quotas for imports of paper and board and printed products from individual Efta countries and Finland (see *Trade and Industry* of 17 December 1976) have also been exhausted:

UK tariff heading	Country of origin	HM Customs serial no. (part 11 of the UK tariff)
ex 48.01 E II b)	Austria	2052
ex 48.01 E II b)	Finland	2079
ex 48.07 B	Switzerland	2745
ex 48.07 B	Norway	2761

Inquiries about current tariff quota balances may be made to HM Customs and Excise, Central Tariff Quota Registration Unit, King's Beam House, Mark Lane, London EC3R 7HE, tel. 01-626 1515 ext. 2570.

New EEC documents

This list of EEC documents was deposited in the House of Commons during the week ended 16 June (commission reference numbers, where appropriate, are given in parentheses): The documents are available for consultation at the European Communities Commission, Information Office at 20 Kensington Palace Gardens, London W8 4QQ.

R/1277/77 (COM(77)171)
Draft Directive on consumer protection in the marking and display of the prices of foodstuffs.
R/1292/77 (COM(77)186)
Communication from the Commission to the Council regarding energy savings from the modernisation of existing buildings in the Community.
R/1294/77 (COM(77)187)
Proposal for a Council Regulation on the granting of financial aid to demonstrate projects in the field of energy-saving; Proposal for a Council Regulation on the granting of financial support for projects to exploit alternative energy sources.
R/1299/77 (COM(77)228)
Amended proposal for a Council Regulation concerning producer groups and associations thereof.
R/1304/77 (COM(77)192)
Proposal for a Council Regulation laying down conditions for the post-clearance collection of import duties or export duties which have been underpaid on goods *entered for a customs procedure involving the obligation to pay such duties.*
S/799/77 (COM(77)173)
Forwarding of a recommendation for a Council Decision *concluding a Financial Protocol between the European* Economic Community and Greece.
S/834/77 (COM(77)205)
Two proposals for Council Regulations extending respectively: the arrangements applicable to trade with Malta beyond the date of expiry of the first stage of the *Association Agreement; the arrangements applicable to* trade with the Republic of Cyprus beyond the date of expiry of the first stage of the Association Agreement.
S/847/77 (COM(77)236)
Proposal for a Council Regulation (EEC) maintaining in force the arrangements subjecting to authorisation *imports into the United Kingdom of certain knitted or* crocheted under-garments originating in the Republic of India.
R/1247/77 (COM(77)216)
Draft Council Regulation (EEC) temporarily suspending the autonomous Common Customs Tariff duties on a *number of industrial products.*
R/1341/77 (COM(77)215)
Proposal for a Council Regulation (EEC) fixing the *threshold prices for cereals for the 1977-78 marketing year.*
R/1348/77 (COM(77)214)
Commission report to the Council on the situation regard*ing the production and marketing of hops: 1976 harvest;* Proposal for a Council Regulation (EEC) laying down, in respect of hops, the amount of the aid to producers for the *1976 harvest.*
R/1357/77 (COM(77)235)
Proposal for a Council Regulation (EEC) fixing, for the *1977-78 marketing year, the production aid for canned* pineapple and the minimum price to be paid to pineapple producers.
R/1358/77 (COM(77)213)
Proposal for a Council Regulation (EEC) fixing the minimum price and the special minimum price for tomato concentrates for the 1977-78 marketing year.
S/860/77 (COM(77)204)
Proposal for a Regulation extending the special provisions applicable to the importation into the Community from Greece of goods covered by Regulation (EEC) no. 1059/69 (processed agricultural products).
S/897/77 (COM(77)242)
Proposal for a Council Regulation maintaining the interim protective measures with regard to imports into the United Kingdom of Great Britain and Northern Ireland of cotton yarn, not put up for retail sale, originating in the Republic of India.
S/898/77 (COM(77)209)
Proposal for a Council Regulation concerning import *arrangements for certain jute products originating in the* People's Republic of Bangladesh.
R/1273/77 (COM(77)212)
Emergency food aid supplying to the Catholic Relief Service 3000 tonnes of skimmed milk powder (reserved from 1976 programme) and 2000 tonnes of butteroil (1977 programme) for distribution to certain sections of the population of Chile.
R/1284/77 (COM(77)185)
Community action programme for the rational use of energy (RUE): Second series of legislative proposals.
S/906/77 (COM(77)255)
Proposal for a Council Regulation maintaining the arrangements making the importation into the Benelux countries of jute yarn originating in the Kingdom of Thailand subject to authorisation.
R/1311/77 (COM(77)230)
Proposal for a Council Regulation (EEC) laying down general rules for offsetting storage costs for sugar and repealing Regulation (EEC) no. 750/68.
R/1312/77 (COM(77)231)
Proposal for a Council Regulation (EEC) amending Regulation (EEC) no. 447/68 laying down general rules for the intervention buying of sugar.
R/1313/77 (COM(77)232)
Proposals for Council Regulations (EEC): fixing, for the 1977-78 sugar marketing year, the differential charge to be levied on raw preferential sugar and the differential amount to be granted in respect of raw cane sugar from the French overseas departments; laying down, for the 1977-78 sugar marketing year, measures to facilitate the disposal of sugar produced in the French overseas departments.

Consultative documents

R/407/77 Add 1 (COM(77)203 final)
Addendum to the report by the Commission to the Council on the foreseeable developments in the planting and replanting of vineyards in the Community and on the ratio between production and utilisation in the wine sector.
R/1098/77 (COM(77)181)
Proposal for the transfer of an appropriation between Chapters within the Commission budget estimates for the financial year 1977.
R/902/77 (COM(77)127)
Commission Memorandum on the financial aid awarded by Member States to the coal industry in 1976.

EEC – your questions answered

This week, we are publishing a selection of questions put to the Department of Industry's EEC Information Unit during the past month.

The unit helps business men by answering general questions about EEC membership. Its prime responsibility is with those matters which are the concern of the Departments of Industry, Trade, Prices and Consumer Protection, but it is usually possible to direct an inquirer to sources of specialist advice in other government departments.

Contact the unit by ringing 01-215 4301 (six lines) or by writing to the EEC Information Unit, Department of Industry, 1 Victoria Street, London SW1H 0ET.

Professions in the EEC

Q. Which professions have free access to jobs in other EEC countries?

A. The free movement of persons is one of the fundamental principles of the European community.

Agreement on free movement of employed people was reached as far back as 1964 but discrimination remained against a whole range of professions requiring national qualifications. Progress towards the adoption of measures for the mutual recognition of these professional qualifications has been very slow indeed.

However two cases brought before the European court of justice in 1974 – Reyners and Van Binsbergen – opened the way for more positive action by the commission by declaring that in respect of establishment and the provision of services, there could be no discrimination on grounds of nationality or by way of a requirement of residence in a particular member state.

Doctors were the first of the professions to reach agreement on the mutual recognition of qualifications necessary for intra-community practice*. Since December 1976 the EEC's 450,000 doctors have been free to practise in any of the member states, subject to certain training qualifications and experience. Consultative committees assist the commission so that community rules are kept up to date (see *Trade and Industry*, 27 May, page 390).

In March this year the council reached agreement on a directive† enabling lawyers to provide their services throughout the community. This directive, which will apply only to the temporary provision of services, is required to be brought into effect by member states before March 1979. It has not yet been possible to provide for freedom of establishment in the legal profession. What has been achieved is the mutual recognition of the status of lawyers as defined in each member state. A lawyer providing services is therefore exempt from residence requirements or registration but must still, when representing a client, practise under the same conditions as lawyers established in the host state.

At present proposals for other professions including architects, nurses, midwives, dentists, pharmacists, veterinary surgeons, chartered accountants and financial advisers are under discussion. Progress to date in these areas may be obtained from the relevant sponsoring department. EIT Division, Department of Trade, tel. 01-215 3573, will assist inquirers in identifying which department is responsible for a specific profession.

* Directives 75/362/EEC and 75/363/EEC (*OJ* L167, 30 June 1975).
† Directive 77/249/EEC (*OJ* L78, 26 March 1977).

Economic and social committee

Q. I understand that the economic and social committee (ESC) is consulted by the commission and council on EEC policy matters. How does it function?

A. Established under the Rome treaties, the economic and social committee (ESC) is an advisory body representing both employers and workers as well as those with special interests in economic and social affairs. It is consulted by the European commission and the council of ministers to consider and express opinions on new legislative proposals. Moreover, it has the right to pronounce on any matter pertaining to the work of the community and to have its views published in the *Official Journal of the European Communities* (C series).

Although the committee's opinions are not binding on the council, the commission can and does amend its own proposals in the light of the committee's views.

All told, the economic and social committee is composed of 144 members nominated by the nine member states and appointed by the council. They are chosen to represent the widest possible range of interests and they serve in a personal capacity – members are not permitted to be bound by mandatory instructions from government or other organisations.

Referrals to the ESC are divided among nine sections, namely: agriculture, transport, energy, economic and financial affairs, social affairs, industry and commerce, regional development, external relations and environment, public health and consumer questions.

The UK, like West Germany, Italy and France, is allocated 24 seats on the committee and these are divided into three groups representing employers, employees and other various interest groups. The current UK membership of the committee is:

Group 1 – Employers
Mr D. A. Clark, Consultant to Imperial Group Ltd
Mr B. Z. de Ferranti*, Deputy Chairman, Ferranti Ltd
Mr T. W. H. Gailey, CBE, Member (former Chief Executive) National Bus Co
Marquess of Hamilton, Director, Northern Bank Ltd
Mr C. Henniker-Heaton, CBE
Mr F. J. Lawton, Past Secretary General, Food Manufacturers Federation
Mr W. G. N. Miller, OBE, Director, Save and Prosper Group Ltd
Mr M. J. G. Wylie, MBE, Director, Anglo-American Asphalt Co Ltd

Group 2 – Employees
Lord Allen, CBE, General Secretary, Union of Shop Distributive and Allied Workers
Mr D. Basnett, General Secretary, National Union of General and Municipal Workers
Mr R. N. Bottini, CBE, General Secretary, National Union of Agricultural and Allied Workers
Mr J. L. Jones, MBE, General Secretary, Transport and General Workers' Union
Mr L. Murray, OBE, General Secretary, Trades Union Congress
Mrs C. M. Patterson, OBE, National Woman Officer, Transport and General Workers' Union
Mr T. Parry, OBE, General Secretary, Fire Brigades Union
Vacancy

Group 3 – Various interests
Mrs J. R. E. Evans, OBE, Member, National Consumer Council
Mr G. Hunter, CMG, Senior Research Officer, Overseas Development Institute
Sir Partick McCall, MBE, TD, DL, Former Clerk, Lancashire County Council
Sir John Peel, KCVO, DM, FRCOG, Chairman, Board of Science and Education, British Medical Association
Mr H. Rees, FRICS, FRVA, Chartered surveyor, auctioneer and estate agent
Miss E. R. C. Roberts, OBE
Dr A. E. Sloman, MA, DPhil, Vice-Chancellor, University of Essex
Sir Gwilym Williams, CBE, Past President, National Farmers' Union

* President of the ESC (October 1976-October 1978).

EEC information

Free service for businessmen!
The EEC Information Unit helps firms of all types and sizes by answering general questions about EEC membership and by guiding them where necessary to more specialised information sources.
New customers are always welcome, particularly firms new to EEC questions.
The unit's address is:
EEC Information Unit,
Department of Industry,
1 Victoria Street,
London SW1H 0ET.
Tel. 01-215 4301 (six lines).

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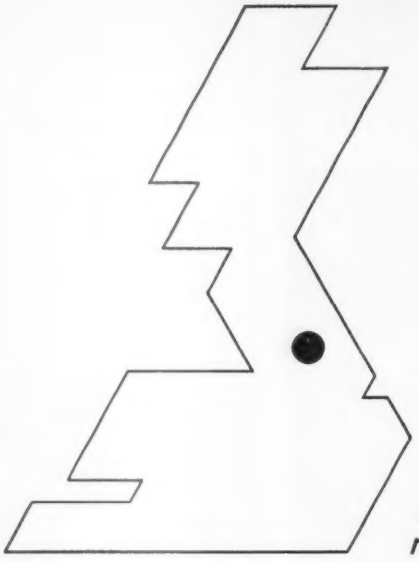

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ENCIRCLE TI 526 ON PAGE 651 FOR FURTHER INFORMATION

Department of Industry
Millbank Tower
London SWIP 4QU
Telephone Direct Line 01-211 7122
Switchboard 01-211 3000

From the Parliamentary Under Secretary of State

We in Yorkshire and Humberside have always realised that this area is the very centre of Britain and I am therefore more than happy to endorse this feature.

Much has already been achieved in the region, and with the Government's positive response to the Economic Planning Council's strategy for the next ten years, the recent upgrading to Development Area status of Hull and Grimsby, the imminent completion of the Humber Bridge and associated trunk road network, and a fine railway network to give excellent communications, the region stands poised on the threshold of further growth and diversification.

My regional office in Leeds is dealing with 50 per cent more development inquiries than at the same time last year, but we remain keen to help as many firms as possible and I hope you will find this Special Report both interesting and informative and that it will prove to be the spur for more firms to seek our advice on possible assistance for their investment schemes.

BOB CRYER
Parliamentary Under Secretary of State for Indus
Member of Parliament for Keighley

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Bernard Cotton, chairman of the Yorkshire and Humberside Economic Planning Council, talks to Alan Williams about the problems and achievements of the region.

What is your initial reaction to the recent award of Development Area status to certain parts of Yorkshire and Humberside?
We're very pleased that the minister has agreed to grant this extra aid to what has become one of the most depressed parts of the region. When I led a delegation to the minister, Mr Williams, in November I stressed that generally the region was not holding out a begging bowl and the fact that the Planning Council – composed of people from right across the region – had singled out the Hull and Grimsby 'travel to work' areas as those appearing to need special assistance really signifies that we all recognised that here was one part of the region that needs particular help. It was, as it were, some aid on account and I am very glad that the minister has been able to agree to our request.

But is it enough – are they the appropriate areas?
Without doubt. One of our boasts about the region is that the steps that we have taken over the last 10 to 15 years have enabled us to weather the recession better than in the past, and better than some of the hitherto more prosperous regions. As it stands at the moment, unemployment in this region is slightly below the national average, and in Sheffield it is considerably below the national average. We have stressed to ministers that we have one or two black spots, such as Hull and Grimsby, and we've got one or two smaller areas, such as Bridlington and some parts of the South Yorkshire coalfields, that have unusually high unemployment, but generally the region has improved its economic stability enormously.

Are you encouraged or disappointed by the government's recent response to your regional strategy for the next 10 years?
I warmly welcome the government's approval of the main recommendations in our Regional Strategy Review. The council is pleased that the government has firmly endorsed the strategy's first priority of encouraging investment in the region, because we have been pressing the government to give more aid to those parts of the region facing serious economic problems, and the recent decision to grant development area status to Hull, and Grimsby, was a clear acceptance of this recommendation in the Regional Strategy Review.

You're really quite optimistic then, about the future of the region?
That's right. Of course, some of the problems that are holding us back are not economic but centre around an imperfect infra-structure. Obviously, the gross dereliction in some of the older mining areas is a very real inhibition when it comes to attracting new industry, and I think that's the sort of aid we would like to see in this area – not aids for economic reasons, but aids to clear up the atmosphere and the countryside, so as to encourage new people to come in.

Are you making progress on that front?
Not as rapidly as we would like. With the inevitable restrictions on money, clearing dereliction today doesn't have the same priority that it had hitherto. In our regional strategy we stressed that the first priority for the region must be to maintain jobs in existing industries and to encourage new industries by improving prosperity. Secondly, we stressed the need for good communication to the ports and only thirdly the environmental factors. But we also said that where environmental considerations would in addition improve the prosperity of industry, then we feel it should be given a higher priority. We would hope this would happen with some of the gross dereliction areas.

I understand that the Accelerated Projects Scheme has been particularly successful in Yorkshire and Humberside – do you see any special reason for this?
I would like to think that it is due to our natural bustle and desire for hard work! But I think most people in the region – and this is one of the real attractions we have to offer – expect to work, you don't have to encourage them to do it. Give them a job and they'll do it. I suspect that the money that was made available to create extra jobs found ready acceptance; most people would rather work.

So you think that perhaps the Selective Investment Scheme will enjoy similar success?
I am sure it will, because if fits right in with the Planning Council's view that aid should be selective. We are absolutely opposed to blanket aid. Obviously, you can carry on with blanket aid until you swamp the country with it, but that way nobody gets any benefit. We would rather pinpoint areas, as we did with Hull and Grimsby, and give them special aid, or selected industries. That way you can really help the industries in most need; in this region, we've had wool textile, ferrous foundry and clothing import schemes, as well as several special schemes with the steel industry and the Coal Board and we in turn have received considerable impetus from their investment programmes. So I think that yes, we must be selective.

But are you entirely happy that the various schemes do in fact encourage the newer technologies and attract new industries to replace those which are running down? Are you getting a true refurbishment of industry?
There are two aspects to that question. Firstly, the schemes are certainly enabling the older industries to rebuild and refurbish themselves, and thus apply the new technologies. But also, because of the effort that has gone into making the region a better place, with much-improved communications and a large number of centres of higher education, we are able to turn out young, more mobile people with the necessary technological skills. And that is what we need to attract the newer industries, so I think we can honestly claim to be making progress on both fronts.

In addition to your role on the Economic Planning Council, you are also chairman of the Osborn Group, an organisation deeply involved in heavy industry and one of the stalwarts of Sheffield. But what about offices, is enough encouragement being given to creation of office employment for young people?
The Planning Council has stressed continually that we must have more service industry jobs, of which office work forms a very large part. And I think we can point to some success over the last few years. Sheffield has recently received a headquarter division of the Midland Bank, as well as the offices of the Manpower Services Commission, and both are quite considerable achievements. In our strategy we designated the larger cities – Leeds, Bradford, Hull and Sheffield – as being the centres most likely to attract this sort of large organisation. But we also said that there were opportunities in the smaller towns for the more specialised office jobs – designers, draughtsmen, that sort of thing – and we have been encouraging district councils up and down the region to build advance office blocks as they would build advance factories. This is important because our experience is that companies won't wait two years for an office block to be built. If an organisation in London wishes to move out, it usually wants to have a look at what offices are immediately available.

You see, then, a continuing need for advance offices as well as factories?
Yes. Generally, councils have folllowed our advice to build speculative office blocks and I am sure that it has speeded up the transfer of office jobs to the region.

You were always a great exponent of the M62, the trans-Pennine motorway; now that it is virtually complete, are you happy with the basic communications pattern?
Not entirely. We are still waiting for the completion of the M118 and M180 roads along the South Bank of the Humber, which ministers have promised us will be complete by the time the Humber Bridge is finished in 1979. It would make no sense to have a

northern highway, and a Humber bridge that terminates in very poor roads, and we're looking forward to the completion of the Humber motorway box. When that is complete, it will open up terrific potential, not only for Humberside, but for Yorkshire and the north west, for we shall have motorways linking the Atlantic ports of Liverpool and Manchester with the European ports of Hull, Goole, Immingham and Grimsby. I believe that, with the completion of these roads, the balance of communications in Britain will be radically altered. For centuries, communications have tended to radiate from London, but now for the first time we're going to have an east-west axis across the centre of Britain and that must be of great importance to the region.

Bernard Cotton

Perhaps the most exciting new development in the region for the future will be the Selby Coalfield complex. How is that going to affect the region?
I honestly think it is going to be like the North Sea on a smaller scale. It's an exciting project and it has come just at the right time. I'm told that they first knew of coal at Selby around 1905, and had it been developed then, the lovely countryside in the area would have been irretrievably spoilt. Today, with modern mining techniques, there is a good chance that we shall be able to extract all the coal we need without destroying the rich agricultural land and the country life that goes with it. And of course, it will give new life to the coal industry. Only 10 years ago we were resigned to the run down of mining and the inevitable reduction in the workforce, but the development of this new Selby field, which also extends far to the east, has thrown an entirely different light on the energy supply situation. I'm personally very pleased with the way the various authorities and the Coal Board are working together to make sure the exploitation of this huge and vital natural resource doesn't disturb the environment and the community life above the field more than absolutely necessary.

That must indeed be important, because I undertand that the other great success story in Yorkshire and Humberside is the growth of tourism.
Absolutely, and it is growing all the time. Britain is becoming increasingly attractive to overseas visitors now, and we expect more and more visitors to come in through the Humber ports so we certainly don't want to see the area spoilt.

Do you think that the traditional comparison, the very great difference between industrial west Yorkshire and agricultural east Yorkshire and Humberside will continue, or do you see a gradual levelling off ?
We wouldn't want to do anything to diminish or affect agricultural activity. Agriculture is still our most important activity, although we often forget it when we talk about our heavy industries, and we have huge areas of top quality land on Humberside. But obviously we need, shall I say, more sympathetic industries in the area simply to provide jobs, especially for the school leavers, who because farming is now so mechanised can't get jobs locally and have to move away. We very much hope that once the Humber Bridge is completed and communications within Humberside so much improved light industry and others not inimicable to agriculture will be attracted to the area. And we musn't forget that the Humber, with its deep waters, will allow the operation of massive chemical complexes. We've already got oil and chemical refineries, and British Steel have their new ore dock at Scunthorpe for bulk carriers, so there are plenty of opportunities for industrial growth without impinging on the agricultural sector.

But do you really think there is going to be the phenomenal growth of chemical complexes on South Humberside that some sources suggest?
I would have thought so. After all, a lot of land has been earmarked on planning documents simply because it is an ideal place. You can bring in the feedstock, deal with it and distribute the resultant material all very quickly, to a mass of industries, none of whom are very far away.

But it is a very different technology, and in the past you have said that Yorkshire people are hardworking but cautious. Are you happy that they will be able to adapt to the demands of these radically different technologies?
I think that's changed over the last few years. Nowadays we're churning out people accustomed to the newer technologies, and I would go so far as to say that our younger people are quite ready for the challenge of new industries.

You have one shortcoming, if I may use that word, in Yorkshire and Humberside in that you don't have a truly international airport, so that you have to use Manchester's Ringway. Even with the M62 open, there must be problems of access from south Yorkshire in particular. Is there any prospect of a more southerly, direct road access?
Yes, access to an airport from south Yorkshire is a problem. We have looked long and hard at airports in the region and we have reluctantly come to the conclusion that with Ringway so close, and with such good rail links to London, there is little sense in pressing for an international airport for the region for some time ahead. But although Ringway is very accessible to the western and northern parts of Yorkshire via the M62, it is not nearly so convenient for south Yorkshire and, if I may speak here as a major exporter from Sheffield, I find that it takes almost as long to go to Ringway Airport from Sheffield as it does to get to London, simply because, the M62 apart, roads across the Pennines are still very poor. The Planning Council has pressed the government to provide an improved route across the Pennines from Sheffield to Manchester, not only to improve access for importers and exporters to Manchester and Ringway from the heart of the industrial connurbation of south Yorkshire, but also to provide Sheffield with a larger hinterland for its office-based industries: we are, therefore, pleased that the minister has announced that, whilst he is not prepared to sanction a further motorway across the Pennines – which, incidentally, we have never asked for, we merely want improved roads – he was going to authorise by-passes around certain towns so as to speed the flow of traffic. When that happens, and we get a shorter journey time between south Yorkshire and Manchester Airport, we shall be content.

Osborn's have a very good record in the export field – what would you say was the special attraction of Humberside and Yorkshire for the exporter, as opposed to any other region?
There are many facets. We have long-established and proven expertise throughout the region in dealing with shipping cargo around the world. There are countless people here with a great deal of experience, that's the first thing. Secondly, our close-knit industry is such that a buyer can come from abroad and in a very short time talk to a variety of firms about all manner of products – he doesn't have to keep travelling. In Sheffield alone he can deal with steel, tools, cutlery, heavy engineering, light engineering, and the same applies to the towns in south Yorkshire such as Rotherham and Doncaster, while nearby in Leeds there are endless commercial opportunities and Bradford for woollen textiles. We are almost a supermarket for exports – a man can come and do a one-stop shopping trip! Thirdly, and perhaps most important, is that we are surrounded by country of outstanding beauty and we find that this is a positive attraction for foreign businessmen and their families. It is surprising how often this has proved to be a deciding factor in whether our overseas visitors come here to Sheffield, or go to our London office instead.

What in your view is the most important objective for Yorkshire and Humberside for, say, the next five years?
Almost certainly industrial prosperity. This is essentially an industrial region – and in that I include agriculture – and if we can achieve prosperity, with both private companies and state corporations producing both economically and competitively, and thus making good profits so that they can rehabilitate their plant, then we shall have little difficulty in employing all the people who wish to work, including the school leavers. I see that as the key to the whole situation.

The Growth Centre of Britain

by David Dell, Yorkshire and Humberside Regional *Director, Department of* Industry

Yorkshire and Humberside is the centre of Britain. This has long been accepted by those who live and work in the region, and now there are encouraging signs that it is increasingly being recognised by industrial investors. The direct evidence available to us here at the regional office, mainly inquiries for assistance with investment projects, shows that so far this year, the average number of proposals are roughly double those put to us last year. About 60 per cent of the proposals come to us from small firms, and only some 10 per cent from companies outside the region, so there is ample evidence of a self-generating pressure for investment which fits happily with our long-term regional strategy.

The same pattern of increased activity is reflected in the number of inquiries received by our export office, again revealing the generally increased activity in exports over a wide range of industries. And there has been a sharp increase in the number of inquiries at our Small Firms Information Centre in Leeds.

All this increased activity suggests that the region has weathered the 1975-76 recession well and is now taking advantage of the upturn. Among the region's traditional industries, the wool textile industry is now busy, particularly those firms which have substantial export business. Several have begun to take advantage of the second stage of the wool textile scheme, making further finance available for improvements in the structure of industry and the performance of small firms. Under the first stage of the scheme, grants of nearly £15 million have been used to support investment of companies amounting to some £75 million.

The engineering industry, too, is now very active and appears to be planning further expansion, and here again there is substantial export business, with evidence that firms who have gone out to promote exports are prospering. Many firms now see exports as their prime growth area and, despite the many problems involved, there appear to be more determined efforts by exporters to get out into the market place to make contacts and seek new business. Yorkshire and Humberside's record in the promotion of Export Year activities has been particularly good.

There are still, however, some areas for concern. The clothing industry in particular has problems, although there has been a general welcome for the recent government action to control imports of cheap suits from East European countries. The construction industry, along with the marine industries, are depressed and the demand for firms producing domestic consumer durables is low. On the other hand, while unemployment remains unacceptably high, it is encouraging that the region's jobless total is now below the national average, and the comparison with national figures has improved since last year.

What then are the key economic factors essential to the development of the region? First there is the extent to which the region's industrial economy is underpinned by small and medium size firms under local management ready to respond quickly to changes in the economic scene. Particularly impressive here is the extent to which the region's industry has penetrated the offshore oil market – a trend which appears still to be rising.

Beyond this there are certain key factors of economic geography which have greatly increased in importance in the region's favour with soaring energy costs and unstable world markets in energy. Perhaps the most important is the region's position at the centre of Britain, now being exploited by the motorways for the first time. Perhaps the most striking feature to one returning to the region after an absence of a number of years is the ease of movement from east to west, and to the north and south. When the Humber Bridge and the motorways to Grimsby and Immingham are complete, the region will have the basic structure for the full development of the new European trading axis. This east–west axis between central Britain, the British industrial heartland north of the Wash, and the continental industrial heartland served by Rotterdam and the Rhine is developing fast. As Ken Bantock reveals elsewhere in this report, the Humberside ports have a key position on the axis because they are the nearest ports to the British industrial heartland within overnight sailing distance of Rotterdam, a critical factor in the economics of roll-on/roll-off unit load traffic. A further benefit of the complete motorway and trunk road system will be greatly improved access from all parts of the region to air services from Leeds/Bradford, Humberside, Manchester and other airports. The rail system in Yorkshire and Humberside also enjoys a key position in the national railway network with through services to London, the south-west, the Midlands, the north-east, north-west and Scotland, as well as Trans-Pennine east/west services serving Liverpool, Manchester, Hull and Grimsby. Intercity services are good, and

Yorkshire planners, while preserving the best of the old, have not allowed themselves to be influenced by the style of the 19th century public buildings, as evidence by this uncompromisingly modern new local authority building in Sheffield alongside its counterpart dating from the industrial revolution.

modern Freightliner services serve all parts of the country.

Another key factor is the Region's strength in energy resources. Humberside is a landing point for North Sea gas and the whole region is an adjacent landing point for North Sea oil, an industry from which the region is already benefiting as a major supplier of special steels and engineering equipment. Further ahead, there are the vast reserves of coal which are now economically extractable thanks to new technology in the mining industry, and it seems inevitable that this resource will become increasingly important as oil reserves are depleted. It is estimated that at the current proposed rates of extraction, these reserves will last 300 years. Even now, there is a big opportunity for the region in supplying equipment and machinery for mining processes, for which orders are likely to be something approaching £150 million over the next few years.

Labour force

Also of importance is that the region generally enjoys labour relations and a stability in its labour force which compare well with many parts of the country, while at management level there is the real tradition of entrepreneurial flair in Yorkshire and Humberside essential for future development.

Against this background, the department has set as its target the creation of wealth and the achievement of self-sustaining growth within the region. We have not looked for the importation of production units without top management, but have aimed to use selective assistance finance to sustain and expand local industrial decision centres, such as companies with their headquarters or at least major profit centres in the region, or completely new companies, allied with a positive attempt to attract headquarters and other mobile service operations into the region from the non-assisted areas; we are also seeking an improvement in the quality, earning power and stability of existing manufacturing industry, allied with the encouragement of diversification and the increase in the industrial base of such areas as the Yorkshire coalfield. And of course, as a result, higher earnings for workers and a considerable increase in job opportunities in the ancillary service sector.

To meet these aims we have available the financial weaponry mentioned by Tony Hassall, our new Regional Industrial Director, elsewhere in his piece, and we have also had special schemes such as the Wool Textile and Accelerated Projects Schemes, which alone brought £23 million to Yorkshire and Humberside in investment projects up to last year. A further £100 million is now available under a new selective investment scheme operated nationally and in which Yorkshire and Humberside projects are already taking their full share. Finally, we have embarked on a major programme of land acquisition and advance factory building in the more fragile areas. Most of this stock is already taken up, but we are continuing the building programme and are ready for further developments to enable us to pursue diversification and build up the manufacturing base.

How, it may be asked, is the region faring so far? Sheffield and south Yorkshire are both now much better off in relation to the average for the country in unemployment and in weekly earnings than they were only five years ago. Sheffield and Rotherham have seen a substantial development in service industries and new offices. At Bradford, while wool textiles remain highly important, other firms have benefited under new sector schemes for modernisation in the ferrous foundry and machine tool industries, and this has greatly increased the diversification of the industrial base. The National Wool Marketing Board has moved from London to Bradford, and the development of two major new Inland Revenue Centres has also helped on the service industry side.

The pattern of diversification has been widespread throughout the region with, for example, William Lamb (Footwear) Ltd expanding at South Kirkby and Provident Management Services opening a large data processing facility at Halifax. In Hull, where the special problems of the area have recently been recognised with the upgrading to Development Area status for Hull and Grimsby, there has been rapid diversification, largely through the swift growth of caravan manufacturing, which has moved strongly into the export markets of North West Europe, and several secondary industries are developing as a consequence.

This is a trend which we must further develop, and it may now be appropriate to consider giving special emphasis to sectors which are under-represented in the region, or which have special potential here. There is a real prospect for further development of the chemical industry on both sides of the Humber, and from this there could well be prospects of a substantial growth in development of plastics products of which the region has less than its share. There is a big opportunity for the plastics industries to export to Europe and for this the region is very well placed. Other industries which might merit special attention are mining machinery, as successor to offshore equipment with which the region did so well, and agricultural equipment both for export and for the home market. We should also aim to continue the growth of high technology industries, a field in which we have a substantial lead on competitors overseas.

Expansion

Ensuring the lasting prosperity of the region and providing for expansion will be a continuing business, and it is one in which all those active in the region – management, workforce and government – have a common interest. The role of the Department of Industry and its regional office can only be small by comparison with that of those involved in industry itself, but it is gratifying that such a successful degree of teamwork has been built up over the years, with individual managements, workers, local authorities, the Development Association, the Regional Economic Planning Council and the Regional Industrial Development Board all playing their part. I am convinced that with this teamwork as a basis, we must continue the drive to build up industrial decision centres and to modernise, diversify and expand manufacturing industry and service operations so that the region can reach its full potential for prosperity.

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The Office Centre of Britain

Alan Williams reports on Midland Bank International's move to Sheffield

'Given that we had to move, we couldn't have come to a better place.' Such is the unqualified praise for Sheffield from D. G. Bassi, manager of Midland Bank's International Division Sheffield Operations Centre.

Faced with continuing staff shortages and high turnover in London, and with the cost of office space spiralling ever upwards, the Midland were prepared to look at almost any location in England, provided there were good communications, a pool of suitable staff and, most importantly, adequate, immediately-available office accommodation. They found all three in Sheffield – a vindication of both the Planning Council's claim to be the Centre of Britain geographically, and their support for speculative office building.

'We found Sheffield' says Bassi 'a most surprising city. Much more modern than I frankly imagined – and so much cleaner than London.' The Midland checked their facts against figures for office centres around Britain supplied by the Location of Offices Bureau and found that indeed Sheffield was able to offer the most attractive package. 'The financial incentives were definitely not the main attraction,' says Bassi, 'what we needed urgently was a stable workforce and adequate accommodation.'

With an office ready for occupation, the Midland were able to move quickly once the decision to go was made; since December 1973, groups of work have been moved from London to Sheffield and this phase is now complete, with 450 of a total of 3000 International Division staff now housed in Sheffield. Of these, almost 100 moved with the job, the remainder being recruited locally and trained in London. Surprisingly few problems were encountered by staff moving from London, whilst the pool of potential staff locally was so great that Midland were able to be selective and set – and maintain – a high standard. The high annual staff turnover of London days has been all but eliminated. By bringing a sizeable unit to Sheffield, the Midland have brought an organisation with a built-in career structure, and already several of the new locally-employed entrants have moved on to pastures new within the Bank. 'And now,' says Bassi with a grin, 'we have set up shop here and proved it works, we have even got a waiting list of staff wanting to move up from London.'

Like most large organisations, Midland can never hope to completely decentralise from London, but there is still plenty of scope for movement amongst the Banks and other City-based institutions before only an essential core is left. Encouraged by the success of the International Division move, Midland are now moving 1000 head office jobs to Griffin House, another speculative office block in Sheffield, and this move should be complete by late summer.

The last word from Bassi: he's full of praise for both the people of south Yorkshire and the friendly, co-operative local authorities and public services who helped make the transition so smooth, although he admits that the arrival of the Midland has had an impact on both local wage rates and house prices. 'We've got good offices, a happy and stable staff, pleasant homes only 10 minutes drive away, good physical and telecommunications, and superb countryside on our doorstep.' Truly the office centre of Britain.

Sheffield now enjoys a reputation as one of the cleanest cities in Britain, and is rapidly attracting new office developments to its new city centre.

Midland Bank is just completing another move to Sheffield – part of headquarters division to Griffin House.

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The Shipping Centre of Britain

by Ken Bantock, port director, Humber

The greater part of all Britain's visible trade with both the EEC and the rest of the world must, for part of its journey, travel by sea. So it is essential that any region which is to maximise its function as a distribution centre for exports must be served by efficient and adequate port facilities. We think the British Transport Docks Board ports on the Humber estuary – Hull, Grimsby, Immingham and Goole – fulfill this essential function, serving both the vast range of manufacturers and service industries in Yorkshire and Humberside and the many distribution centres for the rest of Britain.

Advantageously placed geographically on the east coast of England, the Humber ports together form the third largest shipping complex in Britain and contribute to a functional and economical transport chain for almost any type of cargo on the many routes to and from all parts of the world. Situated near the distribution centres of Humberside, Yorkshire and the industrial areas of Lancashire and the Midlands, the ports can claim to be part of the very centre of the country's commercial activity.

Motorway links

The recently completed direct links to the national motorway network, together with rail and inland canal systems have created fast and competitive transit times to the ports from almost any region in the country, not only for ordinary traffic but also for the large indivisible loads which constantly cross between the Humber and the continent.

The large number of short sea services to northern Europe and Scandinavia, together with traditional cargo liner services to worldwide destinations, give the shipowner, exporter and importer a big choice of efficient general and specialised facilities capable of handling a very diverse range of traffic.

Last year, the ports as a group handled about 32 million tonnes of cargo, nearly 2.5 million tonnes more than in 1975, and together they now deal with almost 10 per cent of Britain's total seaborne trade. Achieved in the face of stiff opposition, this increase stemmed from much improved industrial relations and the efficient use of a highly skilled labour force using some of the most modern cargo handling facilities and installations available today – itself the result of a £40 million investment programme.

Industrial relations

An awareness that good facilities are of very little use unless backed by good service is the root of the very considerable effort made in recent years to secure good industrial relations at the Humber ports.

The rapid technological changes in modern cargo handling techniques and the resultant decline in the demand for labour led to difficulties for a time at Hull in the late 1960s and early 1970s, but these have been largely overcome in the last five years with the result that Hull's record, along with the remainder of the Humber ports, has been among the best in the country.

Each of the Humber ports is complementary rather than competitive with the other, with its own characteristics and trade, determined largely by its position in relation to the deep water channel of the estuary and consequently the type of vessel it can accommodate. But one thing they do have in common is the ability to cater for the tremendous changes that have taken place in seaborne transport and the capacity to cope with new developments and the expansion of the future. Ports are of course an interface at which goods are transferred from one mode of transport to another, each of which usually have a bigger impact than the port costs on total charges for the transportation of goods. But it is the quality of service, giving speedy turnround of ships and efficient movement of cargo, which in the end determines the cost of using a port. Specialised facilities provided by the Docks Board are among the most up-to-date anywhere.

Unit loads

The Humber ports, with a total of 14 roll-on/roll-off berths, are also pre-eminent in the specialised development of unit load handling facilities. At Hull there are nine ro-ro and two container berths which between them provide over 30 scheduled services each week to Scandinavia, Europe and the USSR.

Grimsby has two ro-ro terminals – one for the import of Volkswagen and Audi cars, the other accommodating a thrice-weekly service to and from Esjberg. The ro-ro terminal at Immingham accommodates regular services to Holland, Denmark, Sweden and Norway.

At Goole, special facilities are not required for ro-ro vessels – ships ramps can land directly on to the existing quays and 32 tonne-capacity scotch derricks handle the containers.

Hull, a principal port of entry and despatch for a vast variety of commodities of great importance to the country, has the most varied trade of the Humber ports. It is traditionally a general cargo port in the true sense with a long history of handling any type of cargo. One of the largest UK ports for timber imports and an important centre for grain, its other import cargoes include oil seeds, food and provisions and fruit and vegetables. Outward cargoes include machinery, cars, tractors, caravans, iron and steel manufactures and processed wool. At present Hull, in addition to its current unit load services, also provides about 42 cargo liner services operating to lucrative markets in some 20 Middle East countries. There are also facilities for bulk traffic in oils and liquid chemicals at two deep water jetties.

Grimsby, situated on the southern bank of the estuary about six miles from the North Sea, has commercial docks well sited for its long-standing trade with Scandinavia and North European countries. Food and provisions are the most important single items handled by the port, but other commodities include timber, paper, iron and steel and chemicals. There are also two specialised services, one at the custom-built terminal for handling import and export cars in stern-ramp vessels and the other at a ro-ro terminal provided for Danish Bacon imports and other general cargo. Significantly, Grimsby has more cold storage space than any other single centre in Europe.

Immingham, the deepest water port in the estuary, has been extensively modernised since the war. Facilities now offered have been a major factor in encouraging the tremendous growth in South Humberside of national and international industry such as Courtaulds, CIBA, Fisons, Total, Petrofina and Conoco. Well known for its efficient handling of bulk cargoes of oil, coal and iron ore at the four specialised deep water berths, the port also has a good capacity for general cargo and handles a considerable volum · of ro-ro traffic to Holland and Scandinavia.

Goole is Britain's most inland port, standing on the Yorkshire Ouse at the head of the Humber estuary some 50 km from the North Sea. It has the advantage of a shorter road haul to main industrial areas of the country and the close proximity of the M62 gives fast, economic transit times.

Well known as a liner port, Goole provides fast weekly services to Spain, EEC countries, Norway and Sweden. There are also regular general cargo sailings to Morocco, Mediterranean ports and South Africa. Many liner services cater for containers and a number link with continental groupage services to secure the cheapest possible rates. The port has long enjoyed a reputation for quick turn round and is particularly noted for its excellent labour relations.

The ports of Hull and Immingham have also improved their status as significant passenger ports. In 1976 they handled 450 000 passengers on regular daily sailings from Hull to Rotterdam and Zeebrugge and a summer service from Immingham to Gothenburg. This is a more than tenfold increase in little more than a decade since the board took over in 1963.

Future growth

Now that Hull and Grimsby have full development area status, we expect a surge of growth in industry attracted to both banks of the estuary. With areas of prime land available for port or port-related activities, and river frontage capable of accommodating new river berths and jetties, newcomers will find us prepared to invest further to provide additional general and specialised facilities.

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The Tourist Centre of Britain

by Harry Whitaker,
Director, Yorkshire and Humberside Tourist Board

Yorkshire has been a meeting ground and crossroads for travellers, or 'tourists', since earliest known times.

Throughout history the region has been at the centre and heart of affairs, and the tides of development and change, whether springing from invasion, changes in population, or political and religious views, have all had a marked effect, visible today in the region's historical records and architectural heritage, in the remains of its abbeys and castles, and in the pattern of development of its cities and towns. Nevertheless, the more rural parts of the region have managed to stand aside from the main stream of events, remaining in a remarkable state of preservation.

The west and south of the region has played a prominent role in the industrial and economic development of the country for the past 200 years and this, linked to the social history of the region, has played an important part in the pattern of tourist development.

Statistics, for instance, show that Yorkshire and Humberside has more large hotels than the national average, many built during the expansive Victorian times in the industrial towns and traditional resorts. And the region has benefited from the 1971 Hotel Development Incentive Scheme with the provision of modern hotels to international standards in Leeds and Bradford, as well as in Sheffield, Hull, York and Middlesbrough.

Despite a significant shortage of hotels in the rural areas, what there is is of a high and unique standard. Whilst not every bedroom has a private bathroom, there is every recompense in being awakened by the sound of a waterfall nearby, or to see the sun over the fells from the window of a tiny stone-built country inn!

The region is blessed with a wealth of topographical and physical attractions; no more than a third of the coastline has been seriously developed, while another third is designated 'Heritage Coast'.

A quarter of the 6000 square miles of the Yorkshire and Humberside Region fall within a designated National Park, and there are four major cathedrals, 19 ruined monasteries and 22 castles, some in a remarkable state of preservation and all in sylvan settings of great beauty.

There are 2900 miles of pollution-free river, offering a wide variety of fishing, and sea fishing is a popular, even lucrative sport. The region is well endowed with nature reserves and many areas of outstanding beauty between the National Parks could, with justification, be designated within them.

From the city of York, to villages such as Heptonstall and Thornton-le-Dale, there is a wide range of fine village and townscape in a remarkable state of preservation. Surprisingly the region outside West and South Yorkshire is one of the most sparsely populated in England.

Camping is popular along the coast, chiefly in the area south of Flamborough Head and the south bank of Humberside, with another cluster of camp sites at Scarborough and Filey. They are more thinly dispersed inland and in general fail to meet the pressure of maximum demand either at high season or at weekends. And there is great pressure on available self-catering accommodation in the form of flatlets, cottages and so forth.

Despite enormous progress in the last three years, there is still need for redevelopment of many existing tourist properties. Standards of accommodation need constant care and upgrading, linked to the development of tourist information and accommodation booking services to enable hotels to achieve their marketing objectives.

We at the Yorkshire and Humberside Tourist Board have been looking at these problems since our inception in 1972. So far, the Board has assisted 176 different accommodation projects, creating or updating 4000 available bedspaces and we have raised the number of Tourist Information Centres from eight in 1972 to over 40 in 1977.

The tourist industry cannot avoid the consequences of the economic crisis, but it is not suffering quite the same distress as is to be found in many manufacturing industries. There has, for example, been a consistent rise in employment within the hotel and catering industry since 1973.

In the last few years, there has been consistent growth in the number of tourists from overseas, and the viability of our tourist industry will, therefore, increasingly depend on the world market. In 1976 10 million visitors spent £2,150 million in foreign currency in Britain. The net 'import profit' – foreign spending here, less British spending abroad – in 1976 was £620 million.

For us in Yorkshire and Humberside the big question is how much of this money can be attracted to the region?

Within the region, the turnover in 1975 from all tourism was estimated to be more than £175 million and employment nearly 65 000, or approximately 3 per cent of all employees in industry and services within the region.

Of this total, some 13 400 were employed in hotels, 13 000 in restaurants and cafes, 18 700 in public houses, and 18 000 in other catering establishments, including clubs and catering contractors. The figures, therefore, do not include those engaged in transport, taxi services, the entertainment industry, or maintenance services directly connected with tourist amenities.

Within the region, it is difficult at any one time to measure the flow of tourism, but a simple calculation of the capacity of the new car ferry services through the port of Hull shows that it might be possible within two years to improve the flow of foreign currency within the region by some £24 million.

The importance of the foreign tourist lies in the fact that the British market for superior hotel accommodation is of necessity curtailed by the present squeeze on incomes. If therefore the hotels had to rely entirely on the British market at the present time it is doubtful whether they would either remain profitable or continue to maintain employment levels.

With their great dependence on the local market, Yorkshire and Humberside hotels are particularly vulnerable to seasonal trends and to economic conditions within the region – another reason to improve the flow of overseas visitors.

The situation, therefore, while potentially difficult, is not without great opportunity. Recent projections of likely foreign traffic flows to the year 1980 show there will be an expanding market for foreign tourists upon which the region should capitalise.

Despite being rich in the natural assets which attract leisure tourists, and in spite of having the commercial activity adequate to create business tourism, the region must remain vigilant and progressive if it is to take advantage of the latest opportunities for one of its oldest industries.

A remote farm like this often offers 'bed and breakfast' – a sign the foreign visitor has grown to know and appreciate.

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Administrative Manager,
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ENCIRCLE TI 535 ON PAGE 651 FOR FURTHER INFORMATION

The Success Centre of Britain

The stories of just six of the many successful companies in the Yorkshire and Humberside region.

Pacemaker platemakers

Leeds-based Howson-Algraphy are among world leaders in the development and production of presensitised aluminium lithographic printing plates. And it is their proud boast that their product quality, coupled with their technical back-up, enables them to deal with a printing problem anywhere in the world quickly and efficiently. In a nutshell, their two main products are printing plates and the ink that goes on them. But that is an over-simplification, for Howson-Algraphy offer a comprehensive range of positive and negative presensitised printing plates and associated chemistry, as well as the associated equipment.

In the 1976 calendar year, group sales topped £35 million, of which £23 million represents overseas sales. The company has 10 overseas subsidiaries in the United States, Sweden, the Netherlands (two), France, Italy, Spain, the Lebanon, Australia and South Africa.

Chief executive Ron Taylor explains that some of these subsidiaries abroad are manufacturing companies, while others are simply sales organisations. The group has nearly 1600 employees throughout the world, but over half are based in Leeds.

Howson-Algraphy have twice won the Queen's Award for Exports in recent years, in 1973 and again in 1975, for their successes in overseas markets.

'Sales during the first four months of 1977 are already at a higher level than during the same period last year', says Taylor, 'so we are hoping for a third try at winning the award this year!'

Expansion in sales, both at home and abroad, has dictated a considerable and continuing expansion programme for Howson-Algraphy; extensions to the main plant at Seacroft, Leeds, are under way, to be followed by the installation of new plant.

The company, which is an operating group of Vickers Ltd, exports to more than 90 overseas countries, both direct and through a network of distributors.

Howson-Algraphy Ltd was formed by the 1970 merger of two separate companies, Howson and Algraphy. Both have local origins; Algraphy was set up in Yorkshire in 1898 and subsequently moved south, while Howson's have been in Leeds ever since their formation in 1946. After the merger Algraphy wound up their southern operation and moved back to Leeds to form part of the new organisation, and since then progress has been rapid; in 1973 the company became an operating group of Vickers Ltd and new products have been developed to augment the world-beating Marathon plate.

Rolling in the exports

Davy-Loewy Ltd, Queen's Export Award-winning engineers, have been at Darnall, Sheffield since the 1830s. But exports have proved the spur for the latest stages of development, with overseas sales zooming up from £4.25 million in 1973 to £25.3 million in 1976.

Essentially producers of steel works plant with nearly 2000 employees, the company has a present turnover of £51 million. Proving Yorkshire engineers' reputation to be second to none, Davy-Loewy recently invested in a gear grinding machine, one of only three of its kind in the world – and found they had to build a new factory to house it!

Their Darnall operation is one of the most modern in Europe with computer-aided draughting equipment, and recently won orders worth nearly £40 million from the Soviet Union for forging and manipulator plants.

Rolling mills

Davy-Loewy, part of the Davy International Group, design, manufacture, supply, install and commission rolling mills, hydraulic presses, process lines, associated ancillary equipment and control systems for steel, aluminium and other non-ferrous metalworks plant.

The company also provides co-ordinating engineering and procurement services for installations incorporating equipment supplied by Davy-Loewy divisions, and manufacture custom-built plant for a wide range of other industries.

Davy-Loewy regularly export major items of plant and spares, designed and manufactured in Sheffield, to most major countries throughout the world. During the last few years the company have established new markets in Brazil, Mexico, the Soviet Union and Japan. Recent achievements include the sale of a cold mill in Europe after intense competition, and a plate mill to Rautaruukki Oy, Finland's leading steel producer.

In Britain, too, the company has won a major order for a heavy bar and billet mill at Guest, Keen and Nettlefold's Brymbo Steel Works at Wrexham, North Wales.

Largest of its kind

The company recently designed and built an 8000-tonne forging press, largest of its kind in the world for Kobe Steel, Japan. The sophisticated electronic control equipment for this press was also supplied by Davy-Loewy, and similar control equipment was built for a 2000-tonne drawdown forging press manufactured by Davy-Loewy's Japanese licensee, Sasebo, for another Japanese company. Other recent export successes include a copper tube producing plant for RTB Bor, Yugoslavia, a feature of which was a 3500-tonne extrusion press designed and manufactured in Sheffield, and the design and supply of a valve producing plant for Russia won in the face of intense competition.

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and we'll show you

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in

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As well as glorious scenery and a way of life that matters most, England's largest county contains definable, and indefinable, qualities that spell success for its newest light industries.

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Most say it's the labour, its character and stability; the communications, the ease of going anywhere on business or pleasure; plus probably a country home of one's dreams.

There are financial incentives, too, in North Yorkshire's Development and Intermediate Areas; and the County Council operates an industrial mortgage scheme.

But the greatest total encouragement is our newcomers' consistent success rate.

Make no mistake, there is something special behind it, and that something special is North Yorkshire and its people.

INQUIRY: B. H. Belshaw, Industrial Promotion Officer, North Yorkshire County Council, County Hall, Northallerton, North Yorkshire DL7 8AD.
Tel. (0609) 3123 Ext. 341

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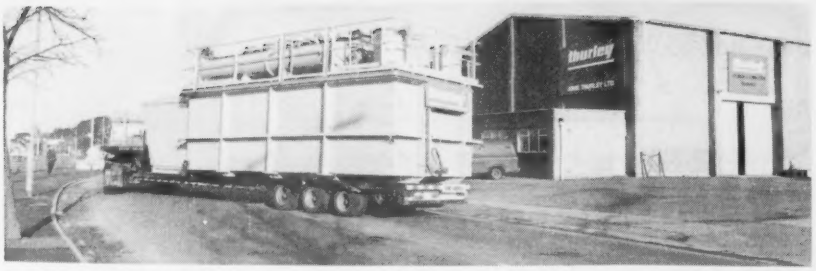
The Success Centre of Britain

Stepping on the gas



One of 11 natural gas fired cryogenic vaporisers leaving the John Thurley Ltd, Harrogate, works for the Gasunie liquid natural gas installation at Maasvlakte, Rotterdam.

Energy conservation is the stock-in-trade of John Thurley Ltd, makers of industrial gas heating equipment in Harrogate since 1959. The aim is to make the product more and more economical as the demand for energy becomes greater.

The commercial market, with an emphasis on natural gas, is the firm's main target; a recent boost has been approval by the British Gas Corporation for the company's range of seven standardised direct gas fired, flueless space heaters.

Chairman and managing director John Thirley told us: 'We aimed at a specific market from the beginning; we are very much concerned with the natural gas industry. It is our chosen specialisation and our experience with liquid natural gas is considerable.'

Thurley has just concluded a licence for offshore gas production equipment. Heaters for drying dye-stuffs are made in Harrogate, as are dryers for such products as Nescafe and Cadbury's Smash. The firm also installed the direct-fired gas heaters in the new London suburban shopping centre at Brent Cross. It is, claims Thurley, their direct gas firing technique which achieves economy by saving energy and money while satisfying the heat needs of a wide variety of industrial processes. Natural gas, being clean and sulphur-free, can be burned directly in an airstream without causing excess pollution.

Like many of the firms we spoke to in Yorkshire and Humberside, John Thurley Ltd has a formidable export record. During last year, it exported £1.5 million worth of natural gas equipment to Common Market countries, as well as to Spain and Scandinavia. One of the company's most unusual recent overseas shipments was a copper melter for Yugoslavia.

John Thurley recently concluded an agreement for the firm's vapourisers to be manufactured under licence in the United States – a remarkable fact since when he returned to Britain from America in 1964, he began with a licence to manufacture in the United Kingdom products from the company which is now his licensee!

Originally founded in London in 1957, the company was re-established in Harrogate in 1964 and now has a total workforce of 70. Together with their American associates, they can claim more than a century of experience in natural gas application. In 1976, the company won the Queen's Award for Technological Innovation.

John Thurley has had no financial assistance from the Department of Industry, but he freely acknowledges the help and advice he has received from DoI's Yorkshire and Humberside regional office: 'Their progressive, commercial attitude has been most helpful', he told us.

Castleford chemicals

Chemicals for preservation are just part of the work of Hickson and Welch (Holdings) Ltd, and such has been the success of this expanding Castleford, west Yorkshire company that they have not only preserved their workforce, they have expanded it by over 10 per cent during the last year. With 1250 staff at their Castleford headquarters, Hickson and Welch are the only chemical plant in a town otherwise dominated by mining and its associated industries.

A public company manufacturing organic and inorganic chemicals, as well as timber preservation materials, Hickson and Welch originated in Castleford in the 1930s and now employ a workforce of about 2000, the remainder being at Huddersfield, Accrington and Leeds.

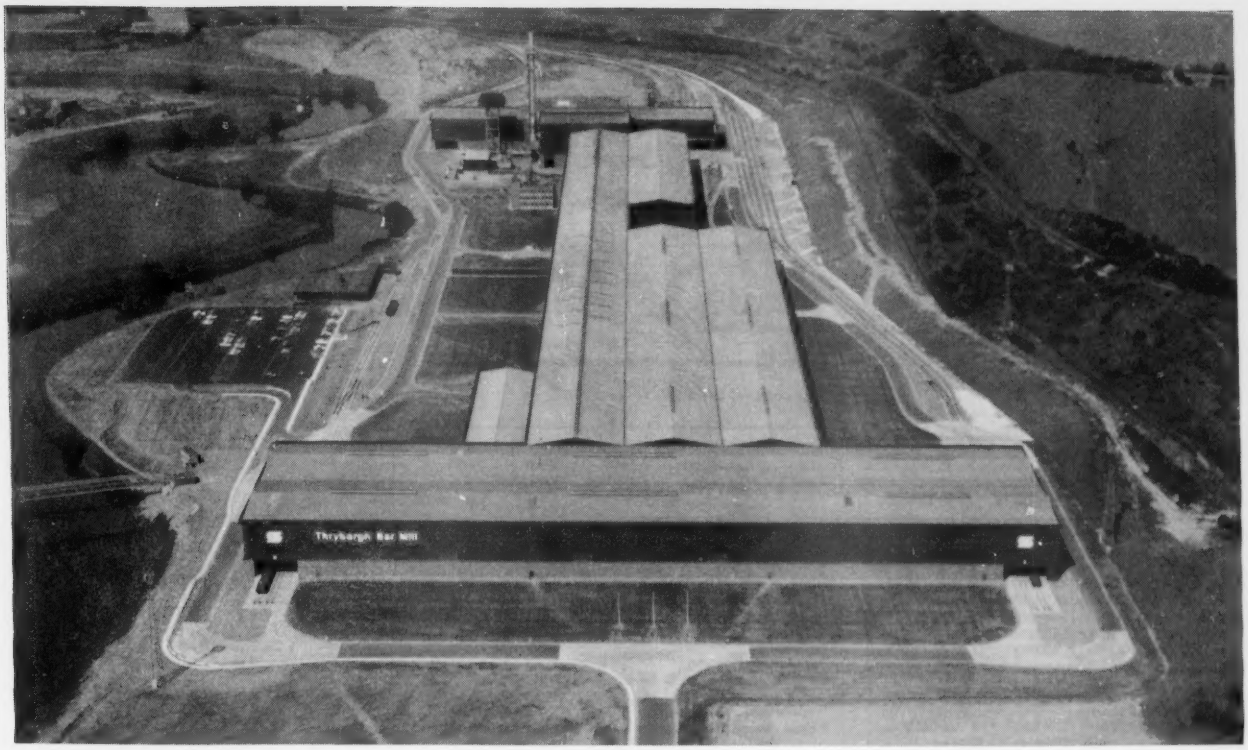
Worldwide profits for the last financial year were £7.87 million, a 70 per cent increase over the previous year's performance; value of sales increased by 30 per cent during the same period. Exports represent 43 per cent of United Kingdom third party sales – those which do not involve any of the firm's overseas subsidiaries in Sweden, South Africa, Singapore, Malaysia, New Zealand, Canada and Brazil. The New Zealand operation is one of the largest companies in that country.

Capital investment in Hickson and Welch has constantly increased each year during the past decade, exceeding £3 million in each of the last two years. This year, the company plans to invest £5.5 million in their UK operations.

The company enjoys a progressive outlook; last year, the main subsidiary company, Hickson and Welch Ltd, received an offer from the Department of Industry under the Accelerated Projects Scheme to set up a factory to manufacture pigment intermediates mainly for the export market. It is estimated that during the next decade this project alone will make a net contribution to the balance of payments of more than £8 million. And now, discussions are under way between the firm and the department for assistance under the Selective Investment Scheme – successor to the Accelerated Projects Scheme – for a similar project.

The UK group have twice won the Queen's Award for Exports – in 1969 and 1973.

Part of Hickson and Welch's works at Castleford.



Steeled for success

The British Steel Corporation's special steels division at Rotherham is dominated by the new £34 million Thrybergh bar mill which recently set a world record by achieving planned weekly production target levels only 11 months after commissioning and 13 months ahead of schedule.

Construction of the mill began on 21 May 1973 and by 28 November 1975, rolling had already commenced. Official opening was in June 1976, and the mill has already passed its target of 8000 tonnes a week, knocking a year off the previous Japanese-held record for working up this type of mill to full production.

British Steel reckon that by 1980 the production capacity of its special bar rolling mills will top a million tonnes per year. Over 40 per cent of this total will be the output of Thrybergh, the most modern bar rolling mill in the world.

Much of the production already goes for export. Export sales manager Peter Jepson calculates that exports represent 35 per cent of current sales. 'But this percentage is increasing and will continue to do so. Thrybergh turns out a superb, low-cost product. We make special bars for the motor and engineering industries – anything that can be turned out on a lathe – and we export to a dozen major overseas markets, including Western Europe and North America. We built Thrybergh with exports in mind, and we are already sending quantities of bar to Eastern Europe, the Far East and South America.'

BSC is justly proud of its Thrybergh mill. Not only is it technically the most modern in the world, it is also one of the most advanced environmentally. The huge 72 500 m² plant is carefully landscaped into the site, and the 60 m high furnace chimney, with controlled emission, meets stringent Clean Air Act requirements. A closed circuit recirculating system for all cooling water ensures that local rivers are not polluted, while latest sound absorbing materials keep noise to a low level both inside and outside the mill.

Customer service has also been given top priority; process flows have been designed to ensure that the rolled product will be released for despatch as quickly as possible by both rail and road, while a high level of quality control is achieved by a computerised tracking and monitoring system.

We're self generating

In Filey, a town once dominated by a holiday camp but now highly diversified, Dale Electric of Great Britain employ more than 400 people producing diesel and gas turbine-driven generating sets, and enjoy a formidable export record.

'We were here before Butlin's', says chairman and managing director, Leonard Dale. He started the company in 1935 and has been expanding ever since. Says Dale: 'We believe in expansion in this firm – our motto is "If we don't grow, we die!" ' Filey's unemployment rate hovers around 8 per cent, but it is mostly seasonal, based on the tourist, catering and entertainment trades.

Dale's generating equipment has a dual purpose; in some applications it is used for prime power, as for example in remote locations where there is no main supply, but increasingly also in public buildings, hospitals, offices and in departmental stores in cities as standby equipment to maintain essential supplies in case of power failure. In both applications, absolute reliability is of course essential.

Dale Electric of Great Britain Ltd are part of Dale Electric International, with branches in Sweden (Dale Electric Scandinavia) and Dubai (Dale Electric Middle East). There are also several associate companies in plant hire, electronics, transport and electrical installation.

Turnover during the last financial year was £12 million of which £8 million was exported to over 60 different countries; the company have developed considerable acumen in selling to third world countries via Japan, and export orders received through Japan alone during the last 18 months have totalled more than £1 million.

Indeed, exporting to the third world is a feature of the firm's work; 'We work direct with many countries' explains Dale, 'over the years we have built up a network of agents and business contacts overseas. We try to be flexible; sometimes we will deal direct with governments. To a great extent it depends where the inquiry comes from as to how we deal with it.'

The growth in exports has meant considerable expansion for Dale. 'We have had a lot of helpful advice from the Department of Industry, and we have taken advantage of Regional Development Grants, but in terms of capital we are almost entirely self-generating' puns Dale. Further extensions to the Filey headquarters are due to be complete by late summer, and two new factories going up in nearby Scarborough are expected to be ready about the same time.

Distances by Road

From	to Hull	to Grimsby
Birmingham	133 miles (214 km)	122 miles (196 km)
Glasgow	246 miles (395 km)	287 miles (462 km)
Leeds	52 miles (84 km)	81 miles (130 km)
London	197 miles (317 km)	164 miles (264 km)
Manchester	88 miles (142 km)	104 miles (167 km)
Newcastle	123 miles (198 km)	165 miles (266 km)
Nottingham	91 miles (146 km)	72 miles (116 km)
Sheffield	58 miles (93 km)	71 miles (114 km)

From	to Immingham	to Goole
Birmingham	129 miles (208 km)	118 miles (190 km)
Glasgow	287 miles (462 km)	236 miles (380 km)
Leeds	75 miles (121 km)	34 miles (55 km)
London	178 miles (286 km)	179 miles (288 km)
Manchester	100 miles (161 km)	67 miles (108 km)
Newcastle	158 miles (254 km)	103 miles (166 km)
Nottingham	77 miles (124 km)	61 miles (98 km)
Sheffield	69 miles (111 km)	40 miles (65 km)

Telephone
Yorkshire and Humberside — *1975/76*

Number of business telephones	340 984
Number of Telex installations	5633
Number of Local calls	not available
Number of Trunk calls	263 000 000

Postal Services

Letters Posted	1 082 384 000
Parcels Posted	21 514 000

Air Transport

Leeds/Bradford Airport
Scheduled Service
Terminal Passengers, 1975

International	42 190
Domestic	235 954
Major Route flows from Leeds/Bradford to:	
London	121 697
Belfast	39 047
Dublin	32 845
Glasgow	13 805
Edinburgh	17 490

Area and Population

	Area (acres)	Population	No. of Persons per acre
West Yorkshire	499 882	2 082 200	4.17
South Yorkshire	381 161	1 317 200	3.46
North Yorkshire	2 051 694	648 600	0.32
Humberside	867 556	848 800	0.98
Yorkshire and Humberside new economic planning region	3 800 693	4 896 800	—
Yorkshire and Humberside old economic planning region	3 503 000	4 785 210	—

Agricultural Land Use (June 1975)

Land	Humber-side	North Yorkshire	West Yorkshire	South York-shire
Total Area (acres)	731 258	1 560 887	248 792	207 722
Arable	613 298	702 855	94 428	139 961
Crops and Grass (Rough)	711 504	1 241 937	216 112	193 513
Grazing	9650	296 232	28 847	11 540
Woodland	3438	11 873	1995	1563
(Other) Agriculture	6667	10 845	1839	1106

Population Age Profile
Home residential population 1975 provisional.

	Males All ages	Thou-sands 15–64	65 +
United Kingdom	27 232	17 482	3034
Yorkshire & Humberside	2386	1530	266
North	1529	986	164
East Midlands	1839	1182	204
South East	8201	5331	928
South West	2046	1283	286
East Anglia	880	558	111
West Midlands	2564	1671	247
North West	3182	2036	340
England	22 626	14 577	2546
Wales	1342	858	158
Scotland	2504	1585	262
Northern Ireland	760	462	68

	Females	Thou-sands	65 +
United Kingdom	28 730	17 575	4794
Yorkshire & Humberside	2508	1524	421
North	1598	983	255
East Midlands	1889	1159	300
South East	8736	5404	1500
South West	2187	1308	427
East Anglia	901	547	156
West Midlands	2614	1620	382
North West	3395	2055	576
England	23 828	14 599	4017
Wales	1423	867	246
Scotland	2702	1651	428
Northern Ireland	777	460	102

Employment Structure and Earnings 1974/75
Yorkshire and Humberside

Industry group	Number of males and females in Region (000) 1975	1974	Regions 1975 % share of UK Employ-ment in Group	Average weekly earnings Manual men Oct. 1975
All Industries and Services	1985	1991	8.9	57.5
All Manufacturing	732.7	764	10.0	57.5
Agriculture, Forestry and Fishing	34.4	35.4	8.9	—
Mining and Quarrying	83.0	81.0	23.7	60.6
Food, Drink and Tobacco	81.4	84.4	11.6	58.2
Coal and Petroleum Products	6.0	5.9	15.2	65.4
Chemicals and Allied Industries	34.7	35.5	8.1	58.9
Metal Manufacture	94.0	92.3	18.8	62.6
Mechanical Engineering	92.9	94.0	9.8	57.1
Instrument Engineering	5.4	5.7	3.5	52.6
Electrical Engineering	28.7	31.1	3.7	51.9
Shipbuilding and Marine Engineering	7.3	7.3	4.2	61.4
Vehicles	43.3	44.9	5.8	61.1
Metal Goods not elsewhere specified	73.9	77.1	13.6	55.3
Textiles	107.4	119.5	21.8	53.2
Leather goods and fur	4.9	5.2	11.9	53.3
Clothing and Footwear	43.0	45.4	11.2	47.1
Bricks, Pottery, Glass and Cement	29.6	32.1	11.0	63.5
Timber, furniture	26.0	28.5	10.0	52.3
Paper, Printing and Publishing	34.5	36.0	6.2	55.9
Other Manufacturing Industries	19.6	19.8	6.1	54.3
Construction	110.2	112.7	8.7	57.8
Gas, Electricity, Water	34.8	33.5	10.2	58.0
Transport and Communica-tions	177.8	110.3	11.9	62.9
Distribution Trades	328.5	225.7	12.1	—
Insurance, Finance and Business services	59.3	58.8	5.5	—
Professional and Scientific	292.9	291.2	8.5	—
Miscellaneous	174.8	163.6	8.1	50.9
Public Administration and defence	120.8	114.7	7.5	46.8

Regional profile

	Yorks and Humberside	North	East Midlands	East Anglia	South East	South West	West Midlands	North West	Wales	Scotland
Area sq km	**15 419**	15 400	15 601	12 564	27 223	23 847	13 013	7306	20 766	78 774
Persons per sq km	**317**	203	239	142	622	178	398	900	133	66
Agricultural area sq km	**11 124**	10 692	12 619	10 162	17 478	18 602	9897	4,627	14 944	57 454
Population Males (000s)	**2386.0**	1528.6	1838.9	879.5	8200.6	2046.2	2563.6	3182.5	1342.0	2503.9
Females	**2508.4**	1597.5	1889.1	900.9	8735.5	2187.0	2614.5	3394.9	1423.0	2702.3
Livebirths (rate per 1,000 population	**12.3**	12.2	12.6	12.7	12.1	11.4	12.6	12.5	12.3	13.1
Deaths	**12.1**	12.3	11.3	11.4	11.4	12.7	10.7	12.6	12.9	12.1
Employment (June 1975)										
Employees in Employment	**1985.5**	1265.6	1485.5	671.1	7319.3	1522.7	2212.1	2674.3	997.6	2076.2
% in Agriculture	**1.7**	1.3	2.5	6.5	1.1	3.3	1.4	0.7	0.7	2.4
Production Industries	**48.4**	49.0	51.6	37.9	32.8	37.0	53.5	46.1	44.6	42.0
Service Industries	**49.9**	49.7	45.9	55.6	66.1	59.7	45.1	53.2	52.8	55.6
Unemployment (July 1976)										
Numbers Unemployed	**126 244**	113 153	81 308	34 437	331 824	204 149	149 291	214 927	81 488	165 649
Unemployment rates %	**6.2**	8.7	5.4	5.1	4.4	6.7	6.5	7.7	8.0	7.7
Total Rateable Value (April 1975) (£000s)	**463 606**	305 618	403 342	207 701	3 248 037	471 303	660 055	736 160	246 366	309 224
Average Domestic Property Rate —	**128**	134	160	177	250	177	195	164	118	82

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Barbara Bradbury
Industrial Promotions Officer,
Chief Executive's Department,
Doncaster Metropolitan Borough Council,
2 Priory Place
DONCASTER DN1 1BN Tel: (0302 20321)

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The Centre of Britain at a glance

Unemployment in July 1976 Yorkshire and Humberside

Employment Office/Job Centre	Employees Total (including unemployed)	Unemployed Male	Female	Total	% Total
Filey	3216	109	15	124	3.9
Harrogate	32 561	1086	375	1461	4.5
Malton	5654	136	71	207	3.7
Northallerton	13 313	411	226	637	4.8
Pickering	6050	156	59	215	3.6
Richmond	8279	310	273	583	7.0
Ripon	6452	191	129	320	5.0
Scarborough	24 124	993	220	1213	5.0
Selby	11 925	332	182	514	4.3
Skipton	14 064	341	142	483	3.4
Thirsk	6771	191	93	284	4.2
Whitby	5225	394	83	477	9.1
York	81 391	2595	1034	3629	4.5
Total N. Yorks	219 025	7245	2902	10 147	4.6
Bradford*	164 137	8620	3062	11 682	7.1
Brighouse	11 447	351	167	518	4.5
Castleford*	59 231	3088	1010	4098	6.9
Dewsbury*	67 501	3051	960	4011	5.9
Halifax*	61 077	2146	766	2912	4.8
Hebden Bridge	4103	141	33	174	4.2
Hemsworth*	11 681	1053	336	1389	11.9
Huddersfield	91 123	2530	1364	3894	4.3
Keighley	28 561	1268	480	1748	6.1
Todmorden	6178	189	62	251	4.1
Wakefield	53 833	1847	686	2533	4.7
Yeadon*	25 886	591	216	807	3.1
Leeds*	303 552	14 569	4493	19 062	6.3
Wetherby	8002	160	89	249	3.1
Total W. Yorks.	896 312	39 604	13 724	53 328	5.9
Bridlington	9628	531	127	658	6.8
Driffield	5494	131	59	190	3.5
Goole	12 888	543	255	798	6.2
Grimsby	71 918	3617	1227	4844	6.7
Hull*	179 284	11 363	3332	14 695	8.2
Scunthorpe*	60 635	2008	1247	3255	5.4
Total Humberside	339 847	18 193	6247	24 440	7.2
Barnsley*	75 173	4212	1464	5676	7.6
Dinnington	6412	529	226	755	11.8
Doncaster*	102 590	5753	2 792	8545	8.3
Maltby	9130	437	204	641	7.0
Mexborough*	31 042	2130	1146	3276	10.6
Rotherham	53 783	3120	1431	4551	8.5
Sheffield*	284 802	10 653	4232	14 885	5.2
Total S. Yorks.	562 932	26 834	11 495	38 329	6.8
Regional Total	2 039 000	91 876	34 368	126 244	6.2

* Travel to work area.
Based on annual estimates June 1974 (Great Britain) 6.1

Waterways

Tonnes of goods carried	1975	% fuels solids and liquids carried tonnes	%
Aire and Calder	2 126 440	1 925 397	90.5
Calder and Hebble	126 899	126 899	100.0
Sheffield and South Yorks	444 157	310 214	69.8
Lower Trent	1 726 000	—	—
Ouse	531 000	—	—
Hull and Humber	4 170 000	—	—

Humber Ports

Ports of Hull, Immingham, Grimsby and Goole – Administered by British Transport Docks Board

Port Director, Humber
K. E. Bantock,
P.O. Box No. 1, Kingston House Tower,
Bond Street, Hull, HU1 3ER
Tel. 0482 27235 Telex 52251

Hull
J. M. Hughes, Docks Manager,
P.O. Box No. 1, Kingston House Tower,
Bond Street, Hull, HU1 3ER.
Tel. 0482 27171 Telex 52251

Grimsby and Immingham
R. Bury, Docks Manager,
Dock Offices, Grimsby, DN31 3LL
Tel. 0472 59181 Telex 52250

Goole
E. S. Wilks
Docks Offices, Stanhope Street,
Goole, DN14 5BB
Tel. 0405 2691 Telex 57626

Cargo Liner Services from Humber Ports to:

Afars and Issas
(territory of)
Algeria
Bahrain Island
Bangladesh
Belgium
Brazil
Canada*
(Pacific)
Central America
(Caribbean and Pacific)
China
Cyprus
Denmark†
Egypt
Ethiopia
Finland†
France
Germany (East)†
Germany (West)†
Gibraltar
Greece
Holland†
Hong Kong
Iceland
India
Iran
Iraq
Israel
Italy
Japan
Jordan
Kenya
Korea
Lebanon†
Libya
Malagasy Republic
Malaysia
Maldive Islands
Malta
Mauritius
Morocco
Mozambique
New Zealand*
Nigeria
Norway*
Pakistan
Panama Canal Zone†
Philippines
Poland†
Portugal
Qatar
Reunion
Rhine
Sabah
Sarawak
Saudi Arabia
Seychelles Islands
Singapore
Somali Democratic
Republic
South Africa
Spain†
Sri Lanka
Sudan
Sweden†
Syrian Arab Republic
Taiwan
Tanzania
Thailand
Tunisia
Turkey*
United Arab Emirates
U.S.A. Atlantic†
U.S.A. Pacific†
U.S.S.R.†
West Indies
Yemen Arab Republic
Yemen (The People's
Democratic Republic of)
Yugoslavia*

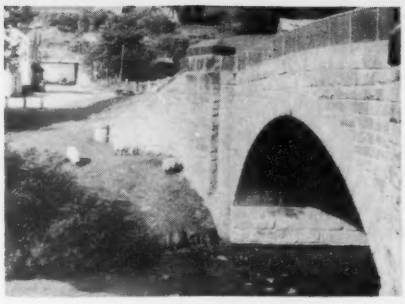
† Service includes unit loads
* Service subject to inducement.

Cargo Traffic: Humber Ports

(*000 tonnes*)

	1975 Inward	Outward	Total
Hull	4470	2119	6589
Grimsby and Immingham	17 415	5755	23 170
Goole	723	1290	2013
TOTAL	22 608	9164	31 772

	1975 Inward	Outward	Total
Hull	3400	2015	5415
Grimsby and Immingham	15 828	6250	22 078
Goole	743	1035	1778
TOTAL	19 971	9300	29 271



The following information is based on the Yorkshire Television Area and was supplied by Yorkshire Television.

Profile of Households in Yorkshire and in UK

	UK 000s	%	Yorkshire 000s	%	Yorkshire % of UK
All Households	19 304	100	2524	100	13.1
Social Class					
AB	2316	12	256	10	11.1
C1	3772	20	442	18	11.7
C2	6690	35	967	38	14.5
DE	6526	34	859	34	13.2
Age of Housewife					
Under 35	4859	25	617	24	12.7
35–44	3593	19	463	18	12.9
45–54	3652	19	479	19	13.1
55+	7200	37	965	38	13.4
Size of Household					
1 person	3150	16	444	18	14.1
2 persons	6776	35	869	34	12.8
3 persons	3255	17	418	17	12.8
4 persons	3492	18	437	17	12.5
5+	2631	14	356	14	13.5
Children (0–15 years)					
With	7105	37	942	37	13.3
Without	12 199	63	1582	63	13.0

Source: JICTAR January '76

Profile of individuals in Yorkshire and UK

	UK 000s	%	Yorkshire 000s	%	Yorkshire % of UK
All Individuals	54 301	100	7104	100	13.1
Males					
Aged					
0–15	7154	13	957	13	13.4
16–24	3285	6	435	6	13.2
25–34	3562	7	436	6	12.2
35–44	3448	6	463	7	13.4
45–54	3557	7	448	6	12.6
55+	5181	10	706	10	13.6
Total Males	26 187	48	3445	48	13.2
Females					
Aged					
0–15	6836	13	906	13	13.3
16–24	3218	6	408	6	12.7
25–34	3602	7	443	6	12.3
35–44	3616	7	464	7	12.8
45–54	3656	7	478	7	13.1
55+	7186	13	960	14	13.4
Total Females	28 114	52	3659	52	13.0
Children					
Aged					
0– 3	3204	6	442	6	13.8
4– 9	5435	10	698	10	12.8
10–15	5351	10	723	10	13.5
Total Children	13 990	26	1863	26	13.3
Adults					
Males	19 033	35	2488	35	13.1
Females	21 278	39	2753	39	12.9
Housewives	19 304	36	2524	36	13.1
Average size of Household		*2.81*		*2.81*	

Source: JICTAR January '76

Rowntree Mackintosh in Yorkshire and Humberside at Castleford, Halifax and York.

Have a Happy Jubilee Break... Have a Kit Kat

ENCIRCLE TI 536 ON PAGE 651 FOR FURTHER INFORMATION

The new metropolitan district of Barnsley covers an area of over 32,000 hectares (127 square miles). It is a surprising mixture of modern commerce and industry in thriving towns and of green rolling Yorkshire countryside. Barnsley is ideally situated as an international distribution centre. Through the region runs the M1 motorway the fast route to the south and into the heart of West Yorkshire. A few miles north the M1 is crossed by the M62, the trans-Pennine link with the international ports of Hull in the east and Liverpool in the west. The M62 also joins the motorway to Scotland. Three major airports are each only about an hour's journey by car from Barnsley. Excellent facilities are available for air freight management. Barnsley has been attracting new industry for many years now. There are many famous companies which have successfully made the move into the area.

THE NEW BARNSLEY

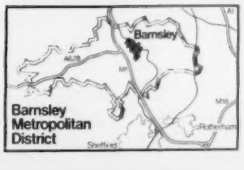
One of the factories on the Platts Common Industrial Estate Hoyland, Barnsley

SEKURA, a Danish Company, manufacture Safety cabs in Barnsley

Barnsley Technical College

A typical Government Advance Factory on the Carlton Industrial Estate, Barnsley

Confident in its own Industrial Progress



For details on industrial development facilities contact:
Harry Spain, Industrial Development Officer,
8 Eastgate, Barnsley.
Tel: 88489 (STD 0226)

ENCIRCLE TI 523 ON PAGE 651 FOR FURTHER INFORMATION

A1 NEWCASTLE
A66
DEVELOPMENT A
Richmond
Cheese Factory
A684
North-allerton
A19
A170
Thirsk
A1
A65
A61
A1
Harrogate
Skipton
Yeadon Airport
A64
York
BRADFORD
LEEDS
M606
Selby
M62
A19
HALIFAX
MANCHESTER
WAKEFIELD
M62
Huddersfield
M1
A1 (M)
BARNSLEY
Doncaster
Sheffield
Rotherham
M18

The Centre of Britain at a glance
AREA
Whitby
Scarborough
Pickering
MALTON
A64
Bridlington
York By-Pass
A165
1079
NCB SELBY DRIFT MINE
Kingston upon Hull
LOOK! DEVELOPMENT AREA
Goole
ANCHOR STEEL MILL
M18
Scunthorpe
Immingham
M180
UNDER CONSTRUCTION
Grimsby
DEVELOPMENT AREA
Birmingham Airport

by Tony Hassall, Regional Industrial Director, Department of Industry

Selective Assistance to Industry is well-trodden ground with which I, as a newcomer, am to a large extent unfamiliar. It is, however, evident that a good deal of manufacturing industry in the region is also unaware of the help that is available. Since the passing of the Industry Act in 1972, over 1100 applications for investment assistance have been made within the Yorkshire and Humberside Region alone. But there are, within the region, approximately 9000 manufacturing establishments whose activities are eligible for assistance in appropriate circumstances, so there is still much to be done to persuade or provoke the remainder into coming forward to see if we can help them. Certainly we do not regard a response of 12 per cent as adequate, especially as the record of the past few years shows that in the Yorkshire and Humberside Region applications for investment assistance that have been accepted have resulted in an average of between 5 and 6 per cent of the total capital spent being awarded as investment aid, either by way of interest relief grant or loan.

From the outside

It might be informative, and possibly amusing, to know how assistance to industry is seen from the outside by the recipients. Industrialists regard selective procedures as starting with regional development grants, since they are available at different rates according to geographical location, and if you should feel that this merely indicates that industrialists do not read the fine print, then this is also quite true – they don't, preferring to leave all that to the civil servants! In a very similar fashion, a second tier of selection concerns the award of industrial development certificates and also availability of advance factories for rental, both of which are more freely available in selected geographical areas. Turning to selective assistance schemes as understood by the majority of industrialists, many are impatient with what they see as very subtle distinctions between sections 7 and 8 of the Industry Act. It must be admitted that the rules are complex and, despite a valiant effort, I do not entirely understand them myself as yet, although doubtless a little experience at the deep end will improve this situation! It is perhaps, therefore, particularly important that the Yorkshire and Humberside Regional Office offers every possible assistance to anyone inquiring about investment aid schemes to enable them to choose, with the benefit of helpful advice, which of the various schemes would offer most assistance in their particular circumstance. Very recently, I attended a trade association meeting at which there was an opportunity to talk briefly about the investment aid schemes and sections 7 and 8 of the act were briefly described. I suspect most of the description missed most of the target, despite its apparent simplicity, and it might well be that a very simple approach, saying that investment aid is available in a variety of circumstances and advice is readily available as to whether your circumstances make you eligible, would achieve a better response.

Yorkshire and Humberside is very fortunate in its regional make-up since it has a very wide spread of industry and is not, as a region, particularly dependent on any one technology or market, although it is agreed that, within the region, certain areas are over-dependent on particular kinds of employment, and one of the aims of regional policy must be to relieve this dependence whenever possible. I should perhaps emphasise this last qualification since, if the regional office tries too hard to persuade applicants to locate in areas that are not of their choice, it will, in the end, merely persuade applicants to opt instead for more congenial climes altogether where their wishes are better met.

Better balance

During recent years my colleagues and predecessors in this office have endeavoured to obtain a better balance between manufacturing and service industries within the region, and it is interesting to see from recent figures that there are approximately one million people employed in the manufacturing and primary industries on the one hand, and approximately the same number in the so-called service industries on the other. In some measure this is due to the assistance afforded to those service industries that have been helped in re-locating in Yorkshire and Humberside.

It is almost impossible to visualise the region as an industrial entity. It is predominantly rural in the north, yet has a heartland of widely varying manufacturing and commercial enterprises and an estuary with flourishing ports which offer, amongst other facilities, very good access to northern Europe for exports (and, of course, equally good access for imports!). There is, particularly in the eastern part of the region, a dominance of good agricultural country and, on the coast, as well as throughout the region, areas where tourism is a major and growing industry. I hope it will be possible to continue to use the selective assistance procedures to continue to promote the growth and prosperity of the region and, moreover, of all parts of the region, although this comment is of course directed towards those manufacturing and service industries to whom the Industry Act applies.

Wool textile scheme

Yorkshire and Humberside has been particularly concerned with the wool textile scheme and, using this one example as an illustration, 140 projects have been assisted and the programme has involved investment of approximately £35 million in re-equipment and £13 million on new or adapted buildings. The selective investment assistance share of this expenditure is about £11 million. All the opinions I have heard on the wool textile scheme have been favourable and have indicated that it has given that industry particularly significant help to face the future with more confidence than seemed possible a few years ago. Another aspect of this particular scheme has been that £1.7 million has been paid in compensation to 86 establishments which have ceased production and it is considered that this tidying up of the industry has been very helpful in enabling it to face competitive pressures.

I very much hope that some of the satisfaction that has been expressed by companies in the wool textile industry will be passed on to colleagues in other manufacturing areas. Certainly, I can assure them of as much help as possible as soon as they approach this regional office, for assistance is our business!

For further information

Some useful regional addresses

Department of Industry, Trade and Prices and Consumer Protection
Priestley House, Park Row.
Leeds LS1 5LF
Tel. 443171

Small Firms Information Centre
Royal Exchange House
Leeds LS1 4PS
Tel: 445151

Department of Employment
City House
Leeds LS1 4PS
Tel: 38232

Department of the Environment
City House
Leeds LS1 4PS
Tel: 38232

British Rail (Eastern Region)
Headquarters Offices
York YO1 1HT
Tel: 53022

British Transport Docks Board
Humber Port Headquarters
Kingston House Tower
PO Box 1
Bond Street, Hull HU1 3ER
Tel: 27235

British Waterways Board
PO Box 9
Dock Street, Leeds LS1 1HH
Tel: 36741

Yorkshire and Humberside Tourist Board
312 Tadcaster Road
York YO2 2HF
Tel: 7077961

"Without ECGD, our export expansion could easily be held down."

"We sell to markets all over the world and we've found the country risk more of a worry than buyer insolvency. On the two occasions we were caught we were glad to have ECGD cover."

"Certainly, it's true to say we do far more business with our ECGD policy than we would if we didn't have it. At the same time, we find the new discretionary limits give us a useful degree of flexibility in our dealings."

Mr. A. G. Park is Chairman and Managing Director and Mr. D. P. H. Hield is Sales Director of Hield Brothers Ltd. of Bradford, whose annual exports of over £5 million worth of worsted cloth and yarn to world-wide markets have just earned them a second Queen's Award for Export Achievement.

ECGD insures from contract or shipment dates. Cover is offered for contracts in sterling or other approved currencies for:

- Continuous, worldwide business ranging from raw or processed materials and consumer goods to mass-produced engineering equipment.
- Sales through UK confirming houses, and by UK merchants.
- Sales to or by overseas subsidiaries of UK firms.
- Services and constructional works contracts.
- Other single large sales of capital equipment, ships and aircraft.

ECGD also offers for certain export business:

- Bank guarantees for export finance at favourable rates.
- Guarantees for loans and lines of credit to overseas borrowers.
- Guarantees for performance bonds, pre-shipment finance and project participants' insolvency.
- Cost escalation cover.

For full details call at your local ECGD office.

ECGD

INSURANCE FOR BRITISH EXPORTERS.

To make an appointment or for information contact Rodney Baker – quoting reference TIK at ECGD, West Riding House, 67 Albion Street, Leeds LS1 5AA (Tel. Leeds 450631) or Joan Swailes at Information Section, ECGD, Aldermanbury House, London EC2P 2EL, (Tel: 01-606 6699. Extn. 258) or the Information Officer at Glasgow, Belfast, Manchester, Cambridge, Bristol, London West End, Croydon or Tottenham offices.

ENCIRCLE TI 530 ON PAGE 651 FOR FURTHER INFORMATION

Overseas trade news

Footwear exports up despite barriers – Meacher

Despite barriers to trading the UK footwear industry succeeded in increasing the value of exports by 30 per cent last year; and this, said Parliamentary Under-Secretary of State for Trade Michael Meacher in a speech to the British Footwear Federation in London on 15 June, was clearly an indication that the heart of the industry was sound.

The government, he said stood ready to back up the industry's export endeavour through the services of the British Overseas Trade Board to the fullest of its resources.

Mr Meacher said that it was a sombre and critical time for the footwear industry. Over the last 10 years the import penetration rate had doubled from 20 per cent to 42 per cent and 1976 had seen the biggest increase in imports ever recorded in one year – an increase of 23 per cent in pairage on the previous year. This had had an effect on employment; the number of jobs in the industry had been cut by more than a third over the last 15 years.

'On the other side of the coin,' Mr Meacher continued, 'it can be said that exports which now account for some 11 per cent of production are hamstrung by barriers raised against us, whether in tariff or quota form, or even by outright prohibition. I do not therefore in any way underestimate the difficulties.'

Mr Meacher then outlined the major conclusions of the report presented by the footwear study steering group (see *Trade and Industry*, 27 May 1977 page 376) and said that they were very much in line with the government's own thinking on the industry. 'We are pursuing urgently all the recommendations addressed to the government, including of course those on imports and overseas trade,' he said.

The government was already considering the possibility of devising a scheme under section 8 of the Industry Act to cover the study group's recommendations for financial assistance. The government was awaiting the federation's revised submission on aid for a major programme of modernisation and also its request for further import restraints.

Mr Meacher said he understood the feeling in the industry about trade restrictions and unfair competition and pointed out that he did not resent the harsh remarks the report made about the Department of Trade – 'although it very much underestimates the action that we have taken to accelerate and use anti-dumping procedures and the vigour of representations made via the EEC to other governments on your behalf.'

In the anti-dumping and countervailing area there had been some successes, which, Mr Meacher thought, should not be ignored. These included the 8 per cent duty imposed last year on some Brazilian men's leather footwear, and more recently the undertaking secured in March on future price levels for some Czech men's leather shoes and Polish men's leather sandals. These were additional to the export restraints negotiated with some east European countries in 1975 and each year since.

'Action on a number of other anti-dumping cases is proceeding vigorously, and we will be pressing to ensure that it is not relaxed when the EEC takes over responsibility next month at the end of the transitional period. We have also made it clear that the Department of Trade will help with future applications under the new rules,' he added.

As for barriers imposed by other countries in some cases, for example Sweden and Australia, representations had yielded at least some of the desired results. 'But this is a tough world and some restrictions are deeply entrenched. If anyone thinks that the trade barriers listed in the steering group's report are due to the Department of Trade playing amateur rather than professional football they should try the job for a few weeks', he said.

Mr Meacher confirmed that in the multilateral trade negotiations a major objective was to change the Gatt safeguard arrangements so that henceforth it would be possible to apply protective measures selectively to the particular imports that were causing disruption.

'We shall also be trying to get the United States to bring its countervailing law into line with international practice and to reduce non-tariff barriers to trade' Mr Meacher said.

As far as tariffs were concerned, Mr Meacher said the EEC's proposal that, broadly speaking, the extent of the cuts should be proportionate to the height of the tariff, would benefit the footwear industry in quite a number of markets. 'While we cannot expect the poorer developing countries to reciprocate, we are not prepared to accept a similar lack of reciprocity from the richer and more industrially advanced countries.'

Mr Meacher also reminded his listeners of one of the major conclusions of the report by the Economic Advisory Group, which said 'that although more protection might be given against some imports and attempts made to reduce some overseas barriers against British footwear exports, the immediate overseas trade problem is a symptom rather than a cause of the industry's difficulties.'

'No one here,' he told his audience 'is likely to minimise either the current problems of the British footwear industry or the extent of the market changes that are likely in the years ahead. But your industry has great strengths, not least its excellent labour relations and the co-operation work people are ready to give in mounting the right effort to beat the competition.'

Have you a good export picture

Each week *Trade and Industry* publishes pictures illustrating Britain's export business. Companies with export successes are invited to send in the story with a photograph showing the goods in manufacture, ready for despatch, or, preferably, on arrival overseas. The story must, of course, reach us while it is still news.
Send your export photographs to the Editor, *Trade and Industry*, Room 439 1 Victoria Street, London SW1H 0ET.

Commonwealth heads review world economy

In a lengthy economic section to the final communique issued on 15 June at the close of their week-long meeting in London the Commonwealth heads of government reviewed the world economic situation.

Their discussions had confirmed the extent of the interdependence of the world economy and they recognised that economic growth in the industrialised countries provided an impetus for the accelerated growth in the developing countries. The heads of government accepted that rapid development in the developing world would be a positive factor for growth and recovery in the developed countries.

The delegates welcomed the steps taken by the developed and developing countries prior to and at the Conference on Inter-

national Economic Co-operation (CIEC) to strengthen international co-operation and foster the recovery of the world economy. In the view of the developing members of the Commonwealth however, the specific measures agreed on were inadequate either by comparison with their needs or as a contribution towards the introduction of a new economic order.

The heads of government welcomed the agreement at CIEC that a common fund should be established as a new entity to play a key role in achieving the objectives of the integrated programme for commodities as set out in resolution 93(IV) at Nairobi. They agreed to work towards the early establishment of the fund, and they have asked that a small technical working group, drawn from Commonwealth countries, be set up to examine the issues which needed to be addressed in further work in the United Nations conference on trade and development (Unctad) with a view to facilitating greater progress at the Unctad conference in November.

The heads of government agreed to work for the early conclusion of the multilateral trade negotiations which inter alia should provide significant benefits to developing countries.

They stressed the important contribution the European Economic Community could make to enlarging the markets available to developing countries. It was urged that the EEC should take further account of the trading interests of Commonwealth Asian countries which had been put at a disadvantage with the phasing out of Commonwealth preferences and the granting of preferential arrangements by the EEC to an increasingly wider group of countries. It was also urged that there should be regular and substantial flows of EEC assistance to include non-associate Commonwealth Asian countries.

The heads of government noted that the persistence of trade restrictions on a number of products, particularly textiles and textile products, which are so important to the economies of developing countries continue to be of serious concern to those developing countries, and urged remedial action as conditions permitted. They recognised that the rapid industrialisation of developing countries would yield benefits to developed countries. The heads of government also recognised that the uncertainty faced by developing-country exporters of textiles had been damaging. They agreed that the negotiations for a new multi-fibre arrangement must be carried out in earnest as soon as possible.

Queen 'delighted' at Export Year achievements

Replying to a letter from Sir Frederick Catherwood, chairman of the British Overseas Trade Board, on the achievements of Export Year, the Queen said she wished the work 'which is so vital for the prosperity of this country' every success. She said she was delighted to read of the achievements of Export Year.

Sir Frederick, who was sending greetings on behalf of British exporters to the Queen on the occasion of her silver jubilee, had referred in his letter to the inauguration of Export Year by the Duke of Edinburgh in May last year.

At that time Sir Frederick said: 'I am sure that those of us who worked in industry would like to see this Export Year as the hinge on which we turn to better things, so that the 25 years to golden jubilee is a quarter-century of prosperity and expansion. And so there is no better present we in British industry could give our Queen at her jubilee next year than the thumping increase in exports which would make all that possible. I am sure everyone here will pledge ourselves to do that as best we can.'

The Duke of Edinburgh, Sir Frederick wrote, had said that he thought there would be no jubilee present more acceptable to Her Majesty.

Sir Frederick then reported on the latest trade figures and the achievements of Export Year (see *Trade and Industry* 10 June, page 489) He pointed out that British exports of manufactures were now running at £25,000 million a year and sales of services (invisibles) at £15,000 million. 'Export year is only the base from which to start a quarter century of prosperity and advance, so we wish Your Majesty prosperity now and to your golden jubilee.'

Visits by overseas commercial officers

The following overseas commercial officers are expected to be in this country shortly, when they will be available for discussions.

Qatar – Doha. D. L. Hardinge, first secretary (commercial) in Doha since October 1976; available September 1977.

Zambia: Lusaka. M. Holmes, second secretary (commercial) in Lusaka since March 1976; available October 1977.

Cuba: Havana. K. H. Jones, first secretary (commercial) in Havana since October 1976; available October 1977.

Because commercial officers often have only limited time at their disposal it may not always be possible to fit everyone in. Where it is possible, firms are reminded that the Export Services and Promotions Division of the Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU who are in close touch with all overseas commercial officers can very often supply advice, or the information that applicants hoped to obtain at the interview. Outside London, the regional Offices of the Department of Industry, Welsh and Scottish Offices and the Department of Commerce, Belfast, can also help.

British firms and organisations who wish to meet the officer are asked to write for an appointment, giving full details of the specific export problem and commodities involved as follows:

Firms in Northern Ireland should contact the Export Branch of the Department of Commerce, Belfast; those in Wales the Welsh Office, Cardiff and for Scotland to the Scottish Office, Glasgow. For firms in the eastern region and the London and south eastern region (and any organisation in the other regions who would prefer or be prepared if necessary to meet the officer in London) should write to Tours Section, Department of Trade, 50 Ludgate Hill London EC4M 7HU. For all other regions, firms should contact the appropriate Department of Industry Regional Office (Exports).

British pavilion at Melbourne

A total of 52 British firms will be represented, either directly or through their Australian agents, at the international engineering exhibition in Melbourne which takes place from 25 to 30 July. The British Overseas Trade Board has organised a British pavilion for the event, which is Australia's most important engineering exhibition.

Companies exhibiting for the first time include: Metallisation Ltd from Dudley; Nordsea Gas Appliance Co Ltd of Denton, Manchester; SMEC (Keelavite Hydraulics – Lucas Fluid Power), from Allasley, Coventry; and Warwick Pump and Engineering Co Ltd, Berinsfield, Oxford.

The exhibition will provide an unequalled marketing opportunity for manufacturers to show their products to Australian buyers and British products on show will include milling machines, industrial fastening systems, machine tools, power transmission products, gauges, micrometers, metal spraying equipment, pumps, hand tools and electrical equipment.

Hints to business men booklets

Revised editions of the booklets on Kenya and Mexico have been published in the *Hints to business men* series. British business men who intend visiting these countries on export business can obtain copies of the booklets from Export Services and Promotions Division, Department of Trade, Room D05, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757, ext. 7146, or any Regional Office of the Department of Industry.

Advertisements are accepted for all booklets in the series which covers over 100 countries. Inquiries about advertising should be addressed to Cheiron Press Ltd, 8/10 Parkway, London NW1 7AD, tel. 01-267 1285.

New guide on drawing up industrial co-operation contracts

The UN Economic Commission for Europe has recently published a 'Guide on Drawing up International Contracts on Industrial Co-operation'. The guide defines the main characteristics of industrial contracts relating to industrial co-operation and although intended for general application is likely to be of special significance for east/west trade in view of the increasing importance industrial co-operation plays in such trade.

Chapter headings in the guide cover:

Different elements of industrial co-operation contracts; industrial co-operation affecting enterprises of third countries; industrial co-operation agreements connected with the construction of a large industrial works; co-operation in the development of natural resources; and general questions included in all international contracts in the field of industry.

The guide will be useful to businessmen and lawyers who wish to know more about industrial co-operation contracts. Copies are available from HMSO bookshops or through any bookseller quoting ref ECE/Trade 124 (sales no. E.76 II E 14).

Seminar on invisibles in Mexico

Mexico City was the venue for a City of London seminar supported by the British Overseas Trade Board in co-operation with the Committee on Invisible Exports from 15 to 17 June.

The seminar, one of the most important all-British event to be staged in Mexico City for some years, outlined the services offered by the City of London in relation with the development of the financial and economic structure of Mexico.

Sir Francis Sandilands, chairman of the Committee on Invisible Exports, and Sir Jasper Hollom, deputy governor of the Bank of England, were joint leaders of a delegation of about 35 members drawn from banking and insurance institutions of the City of London.

Titles of the papers included 'The City of London – an Introduction', 'London as an International Insurance and Reinsurance Centre', 'The International Brokers', 'Development of a Capital Market including the Stock Exchange – Finance for Industry in a Mixed Economy', 'Metals and Soft Commodities: The London Markets; The Futures Market', 'The Development of a Money Market', 'Corporate Finance and Transference of Financial Technique', 'The International Brokers' and 'Inflation Accounting'.

Birmingham's Middle East induction course

To provide its members with better knowledge of the Middle East, its customs and the basic rudiments of colloquial Arabic, Birmingham Chamber of Industry and Commerce is organising a Middle East induction course during the first week of July.

The course will be given by Bernard Butler, who has lived and worked in the Middle East for fourteen years. From 1973 to 1976 he was a training specialist with Saudi Arabian Ministry of Labour, where he wrote part of the current five-year plan and set up the first vocational training instructor training centre in Riyadh.

Further information about the course can be obtained from Graham Ashmore, Overseas Department, Birmingham Chamber of Industry and Commerce, PO Box 360, 75 Harborne Road, Birmingham, B15 3DH, tel. 021-454 6171, ext. 203.

Export office procedure courses in Scotland

The starting dates and locations of export office procedure courses in Scotland organised by the Training Services Agency for the second half of 1977 are:

1 August, Edinburgh; 1 August, Dundee; 8 August, Glasgow; 22 August, Aberdeen; 22 August, Ayr; 5 September, *Glasgow chamber of commerce; 12 September, Edinburgh; 19 September, *Dundee chamber of commerce; 19 September, Glasgow; 3 October, *Glasgow chamber of commerce; 10 October, Inverness; 10 October, Galashiels; 17 October, Dundee; 24 October, Aberdeen; 7 November, *Dundee chamber of commerce; 14 November, Edinburgh; 14 November, Ayr; 21 November, *Glasgow chamber of commerce; 21 November, Glasgow; 5 December, *Glasgow chamber of commerce;

* These courses may attract a handling charge which is imposed by the chamber of commerce.

Inquiries in connection with these courses should be directed to Training Services Agency (OS1-B), 9 St Andrew Square, Edinburgh EH2 2QX (tel. 031-225 8500 ext. 248).

The courses have two main objectives: to enable students to gain experience in office procedure and documentation associated with exporting; to show them how to pass on this acquired knowledge in the most effective way.

The syllabus assumes that students have experience of clerical work but not necessarily a knowledge of export techniques.

Sessions deal with essential aspects of exporting procedure; export sales office functions; EEC, making a contact; export shipping office functions; containerisation; documentation; aids to exporters; bills of lading; documentary letters of credit; bills of exchange and air freight.

Anglo-Soviet shipping protocol signed in London

Mr T. B. Guzhenko, Soviet Minister of Merchant Marine (left) and Secretary of State for Trade Edmund Dell after signing a protocol on 15 June which broadly establishes the legal basis for providing immunity from arrest for state-owned vessels.

Health minister visits Brazil

Eric Deakins, Parliamentary Under-Secretary of State at the Department of Health and Social Security, is visiting Brazil from 22 to 25 June. He is meeting ministers and lending his support to a British health care sales mission which is in Brazil from 19 June to 2 July.

Mr Deakins is meeting the Brazilian Ministers of Health and Social Security to discuss collaboration in health development. It is expected that the minister will also call on the Secretary for Health for the State of Rio de Janeiro.

The British health care sales mission will be led by Dr Fred Wrigley, chairman of British Health Care Export Council, and represents 16 UK firms offering products and expertise ranging from health service planning and hospital building to sophisticated products for diagnosis and therapy.

Notices to importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH. Telephone inquiries should be addressed to the number at the end of the notice.

1619: New open general import licence

The current open general import licence, dated 9 September 1976, as amended, is to be revoked and replaced by a new open general import licence which will become operative on 1 July 1977. This is necessary because of the extensive amendments which have been made to the present licence since it was published. Copies of the new licence are now available from HMSO bookshops, price 75p, or through booksellers.

Under the Import of Goods (Control) Order 1954 (SI 1954, no. 23) the importation of all goods into the UK is generally prohibited except under a licence issued by the Department of Trade. Such licences are broadly of two kinds: first an open general import licence which allows anyone to import any goods to which it applies; and secondly, individual import licences which are required in all other instances and which are issued only to named importers. The second includes open individual licences which are unrestricted as to quantity.

The new open general import licence provides that, apart from certain overriding provisions about Southern Rhodesia and enactments other than the Import, Export and Customs Powers (Defence) Act 1939, goods not listed in either of its two schedules may be imported without the need for an individual import licence. The items in schedule 1 comprise goods which may not be imported from any source under the authority of the licence, and other goods which may not be imported under the authority of the licence when *originating* in specified countries, territories or areas; with the exception of certain goods falling within tariff heading 31.03 or 31.05, goods listed in schedule 2 may not be imported under the authority of the licence if *consigned* to the UK from outside the community area.

Items in schedules 1 and 2 of the new licence are classified by reference to the common customs tariff of the EEC and so are identified by the appropriate heading of the tariff, together with a description. In cases of difficulty about classification the advice of HM Customs and Excise should be sought. Importers should note that licences must bear the appropriate tariff heading and all licence applications (which should be made on form ILB/A) should contain this information.

The geographical areas defined at the beginning of the new licence remain broadly the same, although on the whole the formal titles of the countries listed have been replaced by their everyday names. The main change is that countries with which the EEC has reached a textile agreement under the Gatt multi-fibres arrangement are now excluded from the residual textile area and are shown separately against items in schedule 1 as appropriate.

Although the licence was up to date when it was signed on 13 June 1977, an amendment is now in hand to mirror the amendments made to the current licence since that date, namely amendment 20, dated 15 June 1977, which dealt with certain T-shirts from India, and amendment 21, dated 20 June 1977, which dealt with certain knitted or crocheted shirts from Pakistan. The licence may be amended at any time and copies of amendments may be obtained from HMSO bookshops or through booksellers. The schedules to the licence have been printed on one side of the page only to facilitate the incorporation of future amendments. Changes in import licensing procedures, which may involve amendments to the licence, are generally announced by the publication of a notice to importers in *Trade and Industry*.

Neither the open general import licence nor any individual licence issued under the Import of Goods (Control) Order 1954 exempts importers from compliance with requirements under other legislation, for example certification or licensing under the Food and Drugs Acts, the Diseases of Animals Acts 1950 and 1975 or the Plant Health Act 1967.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 264.

1620: Imports from India of certain types of T-shirts

As already announced on 15 June, the import into the UK of knitted or crocheted T-shirts, as defined below, of cotton or of synthetic textile fibres, is now subject to quantitative restriction. The goods affected and the quota established for the period 1 February to 31 December 1977 are as follows:

Tariff heading/description	Quota
ex 60.04 Under garments, knitted or crocheted, not elastic nor rubberised, the following: T-shirts, being lightweight garments of the vest type, with cap sleeves or other short sleeves, without pockets or collar or front or back opening, not shaped or fashioned, which may be suitable for wear by either sex, of cotton or of synthetic textile fibres.	610 000 pieces

Imports of these garments from India were already subject to surveillance licensing. Outstanding licences issued under those arrangements in respect of these newly restricted goods were revoked with effect from 16 June 1977.

Goods in transit

All imports effected since 1 February will count against the quota. Goods which were already in transit to the UK on 15 June will be licensed, and any excess over the 1977 quota level will be counted against subsequent years' quotas. Traders should apply as soon as possible, and not later than 15 July 1977, in respect of such goods, submitting to Import Licensing Branch, at the address shown above, documentary evidence of the date of shipment of the goods, in support of a completed form ILB/A.

In view of the volume of goods already imported since the beginning of the quota period, and likely to have been in transit when this new restriction was announced, it is unlikely that there will be any part of the quota remaining for allocation either this year or in the foreseeable future, and it should be clearly understood that it is most unlikely that any further licences will be issued for goods shipped after 15 June. Traders with contracts outstanding would be well advised to consider re-export of the goods outside the UK. The general import licensing arrangements for restricted textiles re-exported from the UK are set out in notice to importers 1441.

Inquiries: Import Licensing Branch, tel. 01-603 4644, ext. 367.

1621: Imports from Pakistan of certain knitted or crocheted shirts

As already announced on 20 June 1977, the import into the UK of men's and boys' knitted or crocheted shirts of cotton or of synthetic textile fibres, is now subject to quantitative restriction. The goods affected and the quota established for the period 1 April to 31 December 1977 are as follows:

Tariff heading/description	Quota
ex 60.04 Under garments, knitted or crocheted, not elastic nor rubberised, the following: men's and boys' shirts of cotton or of synthetic textile fibres	1 282 500 pieces

Imports of these garments from Pakistan were already subject to surveillance licensing. Outstanding licences issued under those arrangements in respect of these newly restricted goods were revoked with effect from 21 June 1977.

Goods in transit

All imports effected since 1 April will count against the quota. Goods which were already in transit to the UK on 20 June will be licensed, and any excess over the 1977 quota level will be counted against subsequent quotas. Traders should apply as soon as possible, and not later than 22 July 1977, in respect of such goods, submitting to Import Licensing Branch, at the address shown above, documentary evidence of the date of shipment of the goods, in support of a completed form ILB/A.

In view of the volume of goods already imported since the beginning of the quota period, and likely to have been in transit when the restriction was announced, it is unlikely that there will be much, if any, of the quota remaining for allocation this year. Traders who are already committed to pay for these newly restricted goods by irrevocable letters of credit opened on or before 20 June may submit as soon as possible, and not later than 22 July, copies of these documents and evidence of the proposed date of shipment. There can however be no guarantee that any or all of these goods can be licensed in 1977, and traders may wish to consider re-export of the goods outside the UK. The general import licensing arrangements for restricted textiles re-exported from the UK are set out in notice to importers 1441.

Inquiries: Import Licensing Branch, tel. 01-603 4644, ext 367.

Overseas trade exhibitions

Capital goods emphasised at FIL

From G. C. Gullan, British embassy, Lisbon

Dr Mario Soares, Prime Minister of Portugal, opened the eighteenth Lisbon international fair (FIL) on 27 May accompanied by the President of the National Assembly, Dr Vasco da Gama Fernandes, and by the Minister of Industry, Nobre da Costa, as well as by secretaries of state and other high ranking officials, clearly demonstrating the importance the government attach to FIL.

This year's trade fair was of the usual international scale – too much so, according to local firms unable to book space to show their Portuguese made goods.

There were 260 direct exhibitors representing 740 companies and a quarter of a million people visited the fair. There were 17 national and trade information stands, the largest of which were those of the USSR and Czechoslovakia. The UK also had a national stand with 11 exhibitors, and an even larger participation through local agents. Fifty-eight British firms were represented in this way, giving a total of 69 British firms present, which was the largest foreign participation in the fair. Since Britain is Portugal's largest trading partner it is appropriate that our firms should have been represented on this scale.

For the ninth consecutive year, official British participation was sponsored by the British Overseas Trade Board in conjunction with the Birmingham Engineering and Building Centre Ltd. Against the familiar white, green and blue background, the 11 exhibiting manufacturers grouped around the British trade information stand and in the outside area provided a good display of exclusively industrial goods – a point well taken by the Portuguese authorities in view of the recently introduced austerity measures affecting imports of consumer goods.

A mission from the London Chamber of Commerce and Industry visited Portugal while FIL was in progress and, similarly, did not represent consumer goods but covered capital equipment, shipping and banking. This too was well taken by the Portuguese, as those are the areas in which foreign participation is most welcome. This mission complemented the effort of the British exhibitors at FIL very well indeed.

A British day was organised on 1 June by the British embassy. The ambassador, Lord Moran, visited the joint-venture stand and gave a reception there for the exhibitors and their agents, the mission, FIL officials, the press and others. Films covering general aspects of life in Britain and British industry were shown in the evening.

This fair continues to generate a lot of interest from Portugal's trading partners, especially the east European countries which are still trying to break into the market on a large scale. This was sell reflected in their national stands. The west European countries also interested in maintaining their leading position in the market were represented on information/prestige stands – except for the British stand which was exclusively commercial.

Teletext arouses interest at Montreux

From Mr Hutchinson, British consulate-general, Geneva

Montreux was again the centre of attraction from 3 to 10 June, when the world's manufacturers met for the two-yearly International television symposium and exhibition. The symposium attracted 1700 technical experts from broadcasting organisations all over the world, and together with the 2000 trade visitors specially invited by firms, their presence ensured the commercial success of the jointly run exhibition.

Present were 167 firms, completely filling all the available 7000 m² of exhibition space. By far the greatest number of firms were British but American, German and French companies were also strongly represented. Eighteen out of the 41 British firms present participated in a stand sponsored by the Electronic Engineering Association, as a joint venture arranged with the British Overseas Trade Board. The group stand was well situated and attracted many visitors throughout the eight-day period. These produced a number of firm as well as many good inquiries but, perhaps even more valuable for the exhibitors, was the opportunity for renewing existing contacts and making new ones among the large number of senior engineers attending the symposium.

Eastern European countries were strongly represented at the symposium. As in previous years, impending government spending on television studios was the main topic of conversation amongst the exhibitors. In 1973 it was Yugoslavia, in 1975, South Africa and this year Greece, with plans to introduce a colour service.

On the technical side great interest was shown in the Teletext system pioneered jointly by the BBC and IBA, and marketed by Rank Radio. Future development of this system will be aimed at the domestic market – for example in hotels, where, at the push of a button, guests will be able to read on a television screen their favourite newspaper pages.

The opening ceremony, performed by the Swiss federal finance minister, M. Chevellaz, was marked by the award of a gold medal to John Baldwin of the Independent Broadcasting Authority for his work on the DISC system. The exhibition was also visited by the British ambassador, Mr A. K. Rothnie, who at the British exhibitors' request proposed the loyal toast for the Silver Jubilee.

The next international television symposium and exhibition has been set for 28 May to 1 June 1979. The Montreux exhibition site is to be enlarged by some 3000 m² in time for this event. This new extension will thus provide much needed extra space not only for regular exhibitors at this event but also for companies who have not previously been able to obtain an allocation.

Modernisation boosts shutter market

From D. Warren-Knott, British consulate-general, Stuttgart

Twelve British firms took part in a joint venture sponsored by the Birmingham Engineering and Building Centre and the British Overseas Trade Board at the international shutter and blinds trade fair in Stuttgart from 9 to 12 June, along with five other British firms exhibiting independently in the total of 250 companies from 43 countries.

This fair is held every two years and the first British joint venture was in 1975. Six of the nine firms that then exhibited did well enough to take part again in this year's show and British firms altogether formed the largest foreign representation at this important German trade fair, the only one of its scale and kind in Europe.

Although the West German building industry has been depressed for some time and there is relatively little of the new building that might at first sight support an increased demand for blinds and shutters. There is however a growing market for these in West Germany as a result of the modernisation and remodelling of domestic and industrial buildings and of the interest in Germany, in common with many other countries, in do-it-yourself.

But the West German market was not, in fact, the prime target for most of the British exhibitors who, like Storey Bros and Co Ltd of Lancaster, saw the fair as a useful international forum where they could show new developments to the trade and study continental trends. For this reason there were few firm major orders to record at the close of the four days, although Vertika International of Macclesfield reported some £200,000 in orders taken on the stand for vertical window-blind fabric.

Nevertheless, the range of British components, fabrics and blinds attracted considerable attention from the 15 000 visitors and the

other exhibitors alike and by the end of the fair the South Wales Blind Co said that over 200 inquiries had been received and substantially more orders than expected. This stand held considerable interest for visitors as two girls from the factory at Tonypandy demonstrated the simple, accurate working of the firm's new roller-blind making table.

The general satisfaction of the British participants in the joint venture was particularly singled out by the Stuttgart exhibition authorities at the end of the event as indicating the general success of the 1977 shutter and blinds fair and as grounds for the firm belief that the 1979 event will see a continuation in the growth and importance of this fair.

UK audio sounds out at CES

From Norman Olson, British consulate-general, Chicago

For the third year, the Federation of British Audio and the British Overseas Trade Board sponsored a joint venture of 22 companies at the 1977 summer consumer electronics show (CES) in Chicago's McCormick Place/McCormick Inn from 5 to 8 June. This eleventh annual summer CES set records in all aspects by using over 400 000 net square feet of space for 700 exhibitors who drew a show registration of 50 746.

The British joint venture was made up of seven new exhibitors and 15 returning companies. It is significant that six of the 22 firms have American subsidiaries and others will soon be established. In addition to the 22 joint-venture exhibitors there were almost a dozen more British firms participating in CES independently. The United States is the largest single export market for British industry with British audio increasing its sales from $55 million to $86 million in 1976.

'Why buy British?' as one trade editor wrote, 'well if profitability, reliability, technology, tradition, craftsmanship and orderly distribution aren't good enough reasons, perhaps you shouldn't.'

CES reported attendances from every state and 40 foreign countries. An indication of the international appeal of the show was reflected by Expotus Ltd which received orders from Canada, Singapore, Italy and Venezuela while Metrosound found prospective agents for Hong Kong, Brazil, South Africa and the American forces in Germany. Grabern Audio exhibited for the first time and reported sales way over expectations with inquiries from the United States, Mexico, France, South Africa, Belgium and other countries.

Rola Celestion set up a subsidiary in Houston and expanded its number of representatives. Armstrong Audio will soon establish Armstrong Audio (USA) Inc in Los Angeles and Keith Monks formed its own American company on 1 June. Other American subsidiaries represent Gale Electronics, Bib Hi-Fi, Radford Electronics and Fons International.

Chartwell Electro-Acoustics, exhibiting for the first time obtained inquiries from retailers, distributors, potential original equipment manufacturers accounts and commented that British expertise and products are taken seriously in the United States. B and W Loudspeakers reported that their speakers continue to receive the highest possible praise from the discriminating audiophile and their DMT model was launched with 100 per cent success.

Substantial sales are expected to be received by Decca Special Products, Goodman Loudspeakers, Lecson Systems, Metrosound Audio Products and Monogram Professional Audio. Other joint-venture exhibitors include KEF Electronics, A R Sugden, Linn Products, Environmental Sound (first-time exhibitors who obtained good sample orders), Mordaunt-Short and Monitor Audio.

Although not part of the joint venture, the United States market and CES would not be complete without such British giants as BSR which featured their new computerised Accutrac +6 changer and Garrard which has a new line of turntables to take business away from another dominant country in the industry. Sinclair Radionics showed a new programmable calculator and the company plans to start all deliveries of its mini-tv. Rank Hi-Fi are reintroducing their high quality Leak and Wharfedale loudspeakers.

IMF services the market from a subsidiary in Montreal, Audio and Vision Equipment created interest with its speaker stands and attractive music centre tables while Acoustical Manufacturing report 30-40 per cent increases in speaker sales. Videomaster is into the hot market for tv games while Omex Products was delighted with the acceptance of their music centre equipment. NAIM Audio were exhibitors and JBE turntables were represented by their agents.

The consumer electronics show is a show place for the world-wide industry and a must event for manufacturers. The twelfth annual summer CES will return to Chicago's McCormick Place/McCormick Inn from 10 to 13 June 1978. The somewhat smaller sixth annual winter CES will be held in Las Vegas 5 to 8 January 1978.

'Happy Drupa' for British exhibitors

From British consulate-general, Düsseldorf

Under the slogan happy Drupa 77, the world's largest exhibition for the printing trade took place in Dusseldorf from 3 to 16 June. Almost 1100 exhibitors, of which 50 per cent came from foreign countries, showed the latest techniques in printing and paper converting in all the 13 halls of the exhibition centre.

One of the outstanding features of this event was the fact that actual ordering took place during the exhibition. Ninety per cent of the exhibitors reported very good business and British exhibitors were no exception. The firm of Crabtree Vickers, for instance reported that £1.5 million worth of orders had been placed for their metal decorating equipment, while quotations requested for the supply of machinery amounted to well over £9 million.

Additionally Crosfield Electronics received over £3.5 million worth of firm orders during the exhibition, of which £1.5 million was in connection with the new Magnascan 510, which was introduced at Drupa '77.

In all there were about 100 British firms represented at this event. Some were independent exhibitors, others showed on the stands of their agents and 54 firms participated on four joint-venture stands under the auspices of the British Printing Machinery Association (BPMA) with the British Overseas Trade Board. Equipment on show covered all aspects of printing, paper converting, book binding etc. An overwhelming number of British exhibitors were extremely pleased with the results achieved and confirmed that Drupa, which is held at intervals of five years, is the most important event in this field.

A record number of about 303 000 visitors were recorded of which over 43 per cent came from outside West Germany. These figures underline the international importance of this event and British exhibitors thought that the numbers of inquiries coming from South American countries, Comecon countries and from Africa, were particularly encouraging. The common market countries accounted for about 40 per cent of all foreign visitors. It was felt that the professional qualification of those coming to this exhibition was very high and that they had prepared themselves unusually well for their visit to Drupa.

Alan Williams, Minister of State, Department of Industry, arrived at Drupa on 13 June to be guest of honour at a reception given by the consulate-general for the exhibitors and German business friends. The following morning he toured the UK joint-venture stand.

Later the same day, and the following morning, Sir Frederick Catherwood, BOTB chairman also visited Drupa.

Drupa '77 took place at a time when the printing and paper converting industry was about to recover from a major recession. It is thought that the industry cannot ignore the technical innovation that has taken place in the last few years. It is estimated that there is a backlog of investment to be underaken. Drupa '77 certainly stimulated this trend for new investment, especially for countries other than Germany. British exhibitors at this exhibition were very pleased with the results achieved and towards the end of Drupa were beginning to give thought to increasing production capacity in order to cope with the inquiries received.

The next Drupa will be held in 1982.

Overseas publicity for UK trade fairs

British commercial representatives overseas are keen to publicise UK trade fairs and exhibitions, and welcome posters and brochures from fair organisers. But material must be sent well in advance – at least three clear months ahead of the event – and in sufficient quantity – two or three dozen copies for the representative in each area. A full list of addresses of commercial representatives is published as a quarterly supplement to *Trade and Industry*.

Overseas trade country data

Australia

Jewellery and other precious metal ware etc: public hearing. A notice in *Trade and Industry*, 22 April, reported the series of dates and locations for the public hearings into the question of assistance for the production in Australia of jewellery and other precious metal wares of a kind falling within tariff items 71.01 to 71.04, 71.06, 71.09 to 71.16.

The Industries Assistance Commission has now decided to hold an additional public hearing in the Public Inquiry Room, Industries Assistance Commission, Kings Avenue, Canberra, ACT 2600 starting at 10.00am Thursday 30 June: persons intending to give evidence at the hearing should send eight copies of their submissions immediately to the Industries Assistance Commission, PO Box 80, Canberra, ACT 2600.

Inquiries: CRE 01-215 5319. Ref. CRE 1730/76

Reference on umbrellas, sunshades, parts and accessories. Following acceptance by the Australian government of the Temporary Assistance Authority's recommendation (see *Trade and Industry*, 17 June), the Industries Assistance Commission has now been requested to inquire into the report on the question of long-term protection for the umbrella industry.

The items which will form the subject of the inquiry are umbrellas, sunshades and other goods falling within tariff item 66.01 and parts, fittings, trimmings and accessories falling within tariff item 66.03.

UK firms or trade associations intending to submit evidence at the public hearing, the date and location of which will be published as soon as it is known, should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia, without delay. Evidence may be submitted either through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4FW, tel. 01-930 2524, who will represent UK interests if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319. Ref. CRE 864/77

Reference on books and printed matter. The Industries Assistance Commission has been asked to inquire into and report on the question whether.

1 bounty or any other measure of assistance should be accorded after 31 December 1978 the production in Australia of goods currently eligible for bounty under the Book Bounty Act 1969 and, if so, the nature, extent and duration of such assistance

2 assistance should be accorded other products of the printing industry of a kind falling within chapter 49 of the Customs Tariff Act 1966, and if so, the nature, extent and duration of such assistance.

In conducting its inquiry and presenting its report the commission has been asked to have regard to the government's desire not to impede, by tariffs or quota restrictions, the importation into Australia of goods listed in annex A to the United Nations agreement on the importation of educational, scientific and cultural materials and now admissable into Australia free of customs duty. The commission is required to report by 31 July.

UK firms or trade associations intending to submit evidence at the public hearing, the date and location of which will be published as soon as it is known, should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia, without delay. Evidence may be submitted either through the accredited agent of the firm or trade association concerned, or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4FW, tel. 01-930 2524, who will represent UK interests if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319. Ref. CRE 868/77

Ceramic floor and wall tiles, additional import duty. Following the recommendation of the Temporary Assistance Authority the Australian government has authorised the imposition of an additional temporary specific duty of $A 1.50 per m² of tile on all unmounted coloured (except white) square and rectangular glazed tiles not thicker than 7 mm (tariff headings 69.07 or 69.08) and having a surface area of 5000 m² or more. The question of long-term assistance to the industry has been referred to the Industries Assistance commission.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Orange juice, increase in import duty. The Australian government has announced a change in the import duty applicable to orange juice which will apply from 1 July 1977 to 30 June 1978, pending completion of the Industries Assistance Commission examination of the long-term assistance needs of the citrus industry.

The new rate of duty will be 65 per cent, and the current quotas on orange juice and orange juice concentrates (tariff headings 20-07.211 and 219.) will terminate on 30 June 1977.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Temporary protection for paper-making machinery. A request has been received by the Australian government for temporary protection against the import of paper making machinery of types falling within tariff items 84.31.900 and 84.33.900.

Requests for temporary protection are initially considered by the department concerned and at a later stage they may be referred to the Temporary Assistance Authority for inquiry and report within 30 days of the date of the reference. Any temporary protection which may be awarded on the recommendation of the Temporary Assistance Authority is in the nature of a holding action pending consideration of the general question of protection for the local industry.

Interested parties who wish to make their views known should write to the Department of Industry and Commerce, Canberra, ACT 2600 urgently to ensure that there is sufficient time for their communication to arrive by 29 June 1977.

Inquiries: CRE 01-215 5319. Ref. CRE 865/77

Inquiry into by-law admission for harvesters. The Minister for Business and Consumer Affairs announced on 1 June that he had asked the Industries Assistance Commission to inquire into the by-law admission into Australia of self-propelled combine harvesters and self-propelled green cane chopper harvesters. The inquiry will be held in public but the date and location have not yet been announced. The commission is required to report within 60 days of the date of the reference.

UK firms or trade associations intending to submit evidence at the public hearing should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia without delay. Evidence may be submitted either through the accredited agent of the firm or trade association concerned or through the Australian-British Trade Association, 6th Floor, Dorland House, 18-20 Lower Regent Street, London SW1Y 4FW, tel 01-930 2524 who will represent UK firms if authorised. The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member.

Inquiries: CRE 01-215 5319. Ref. CRE 867/77

Further information

In many cases further information on the notices published on these pages is available to British exporters from the Department of Trade. The main branches concerned are: Commercial Relations and Export (CRE) Division, 1 Victoria Street, London SW1H 0ET (tel: direct dialling); and Overseas Tariffs and Regulations Section (OTAR), Export Data Branch, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel: 01-248 5757). In each case, the relevant information source is indicated at the end of the notice by its initials (OTAR or CRE) and, in the case of OTAR, the telephone extension.

Protection of fixed resistors. The Department of Industry and Commerce in Australia has received a request for temporary protection against the import of fixed resistors (tariff item 85.19.600). Requests for temporary protection are initially considered by the department concerned and at a later stage they may be referred to the Temporary Assistance Authority for inquiry and report within 30 days of the date of reference. Any temporary protection which may be awarded on the recommendation of the Temporary Assistance Authority is in the nature of a holding action pending consideration of the general question of protection for the indigenous industry.

Interested parties who wish to make their views on the matter known should write to the Department of Industry and Commerce, PO Box 80, Canberra ACT 2600 without delay.

Inquiries: CRE 01-215 5319. Ref: CRE 869/77

Brazil

Reduction in rates of sole tax on fuels and lubricants. Decree 79/657, published in the *Diario Oficial*, 5 May, reduced the rates of sole tax on fuels and lubricants by 20 per cent. Details of the new rates are available from OTAR 01-248 5757 ext. 476/474.

Proposed duty reduction on image processors. Customs Policy Council edital 844, published in the *Diario Oficial*, 29 April 1977, gave notice that the council was considering a proposed reduction in import duty on 'apparatus having crystal detectors for image processing', included under tariff heading 90.20.01.99, of from 9 per cent to 0 per cent.

Inquiries: OTAR 01-248 5757 ext. 476/474.

Duty increases on chemicals. Customs Policy Council resolutions 2961, 2962 and 2963, all published in the *Diario Oficial*, 26 May 1977, increased the import duties on certain chemicals as follows:

Tariff heading	Product	Duty rate New	Duty rate Old
ex 23.07.04.99	6-ethoxy-1,2-dihydro-2,2,4-trimethyl-quinoline	45%	17%
ex 28.10.02.03	Orthophosphoric acid, technical or feed grade	45%	15%
28.40.36.00	Sodium pyrophosphate	60%	30%
ex 28.40.38.00	Sodium tripolyphosphate, technical or feed grade	45%	15%
ex 28.40.99.00	Tetrapotassic pyrophosphate	45%	15%
29.44.25.00	Micostatin (nistatin)	30%	15%

Inquiries: OTAR 01-248 5757 ext. 476/47[illegible]

Canada

Temporary customs duty reductions. On 12 May 1977, the Governor-General in council announced several temporary customs duty reductions, under section 273 of the customs act. Several items in the chemicals and plastics tariff were also changed at the same time, under section 12 of the Customs Tariff. Further details of items affected will be published next week.

Inquiries: OTAR 01-248 5757 ext. 455/456/457.

Chile

Special concessions for goods exhibited in international fairs. The Chilean Ministry of Finance has issued decree 175, published in the *Official Gazette*, 6 April, updating regulations governing imports of goods to be exhibited in international fairs, as from 1 January 1977 onwards.

Such imports until the closing of the event are regarded as temporary, but when sold to Chilean customers will benefit from a rebate of 20 per cent of the existing customs duties (*ad valorem* on the cif value) provided the number of units per item for which this franchise has been invoked to cover does not exceed the limitation imposed by the following classification:

Cif price per unit	Number of units to be franchised
Up to US $ 20	100
over US $ 20 and up to US $ 200	20
over US $ 200 and up to US $ 2000	10
over US $ 2000 and up to US $ 20 000	5
over US $ 20 000	2

The above decree also quotes as still valid decree 123 issued in 1953 which states that imports of advertising material, ornaments, souvenirs, typical handcrafts, food, tobacco and alcoholic beverages which will either be used in decorating the stands, shown, sold or given away to the public in the country's pavilion are not affected by any Chilean tax, provided such items are regarded as typical, representative or identified with the country concerned. Visitors to the stands can only buy up to one bottle of alcoholic beverage (broken seal and/or uncorked) plus 60 cigarettes, three cigars and up to three units of each of the other items on show.

Inquiries: OTAR 01-248 5757 ext. 474/476.

CRE tel. Direct dialling **OTAR** telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice

Ecuador

Duty free concessions. The Ecuadorean Ministry of Finance has approved a new regulation, 171, 27 April, which allows all electrical and harbour authorities in the country to import their equipment free of duty.

The aim of this new regulation is to help these authorities to carry out their large expansion programmes.

Inquiries: OTAR 01-248 5757 ext. 474/476.

Egypt

Agency legislation. The Egyptian agency legislation has been partially amended (see *Trade and Industry*, 18 February).

There is now no legal requirement for an agent to be given exclusivity throughout Egypt for a product. Regional agents are permitted. A firm may, of course, appoint separate agents for separate products.

Inquiries: OTAR 01-248 5757 ext. 458.

Finland

Tariff amendments. The Finnish authorities have added footnotes to the tariff headings shown below:

CCCN 39.02 BIV proviso 3: Polypropylene foil falling within this subheading and used in industry for the production of food packaging is duty free, subject to conditions laid down by the Cabinet.
CCCN 59.03 AII: Fibre cloth made of aromatic polyamide which is classified under this subheading and used in industry for the production of insulating components for electrical machines, apparatus and equipment is duty free, subject to conditions laid down by the Cabinet.
CCCN 84.23 CII: Caterpillar tracks ('crawlers') and 'base tracks' falling within this subheading and used in industry for the production of machines classified in heading 84.23 are duty free, subject to conditions laid down by the Cabinet.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Israel

Import licences. Amendments have been issued to the liberalised licensing list (no import licences are required for items on this list although importers must hold an approved importers certificate – all other goods not covered by this list require an import licence) affecting the following CCCN nos: 29.02, 51.01, 82.05. The amended list covering these items now reads as follows:

Item	Description	Special conditions
29.02	Halogenated derivatives of hydrocarbons of the following types:	
	Bromoform	
	Chloroform	
	Chlorofluoromethanes	
	Di-iodomethane	
	Iodoform	Licensed to trade in drugs[1]
	Iodomethane	
1090	Parachlor-ethylene, Trichlor-ethylene	
3010	Hexa-chloro-cyclohexane (gammexane)	Special authority[2]
3090	Toxaphene tech. Halogenated derivatives of cyclopropane and of cyclohexane	Special authority[2]

The regulation may be applied with effect from 27 May 1977, but shall apply from 27 May 1978 except for sub-regulation 30 which will come into effect from 27 August,

Inquiries: OTAR 01-248 5757 ext. 471/462/472/473.

Compulsory standard. R.876 published in South African *Government Gazette* 5563, 27 May, gives details of compulsory standard specification for the safety of domestic electrical laundry treatment machines and comes into effect on 27 July.

Inquiries: OTAR 01-248 5757 ext. 471/462/472/473.

Customs tariff changes. The following amendments were published in the South African *Government Gazette*, 27 May .

R.901 CCCN 87.02, 87.04 and 87.06: The rate of duty on shock absorbers and parts thereof and on McPherson struts, McPherson strut inserts or cartridges imported as replacement equipment or as original equipment with unassembled motor vehicles classifiable in subheadings nos. 87.02.15, 87.02.22, 87.02.24 and 87.02.60 and unassembled chassis classifiable in subheading no. 87.04.25, is amended to 170C per kg.

INDUSTRIAL REBATES: DELETION OF TARIFF HEADINGS

R.902 Item 306.01, deletion of tariff headings 28.17, 28.28, 28.35, 28.47, 28.49, 29.20, 29.29, 69.08, 73.18 and 78.05. Item 306.02, CCCN 39.07: extent of rebate – full duty less 20 per cent. Deletion of tariff heading 83.13. Item 306.03, 34.02 and 59.12: Item 306.04 – 15.07 and 15.10 – full duty. 15.15 Phenol: cresol: cresylic acid: paratertiary amyl phenol – full duty; deletion of tariff heading no. 29.33. Item 306.05 – deletion of tariff heading nos. 13.01, 28.38, 29.14 and 29.16.

Note: The provisions for a rebate of duty are withdrawn:
1 sodium hydroxide (caustic soda) for the manufacture of tungsten carbide, 2 hydrazine hydrate, for the manufacture of isonicotinic acid hydrazide, 3 iron sulphide, potassium vanadate, acid resisting tiles, slabs and sections, acid resisting steel pipes and telluriumlead pipes, for the manufacture of acids, 4 platinum sulphide for the manufacture of antioxidants and accelerators, 5 diethyl carbonate and B-hydroxyethylhydrazine, for the manufacture of furazolidone, 6 acetone semicarbazone, for the manufacture of nitrofurazone and nitrofurantoin, 7 plastic caps and caps of base metal, for collapsible containers of aluminium, for packing toothpaste, shaving cream and toilet preparations, 8 cetrimide, for the manufacture of surgical dressings, medicated plasters and surgical sutures, 9 adhesive plasters for the manufacture of products for the treatment of foot ailments, 10 crude wool grease for the manufacture of sheep marking oil, 11 linseed oil, whether or not boiled, stearine (crude stearic acid) beeswax, xylenol and phenylmercury acetate, for the manufacture of colour, paint, varnish and allied products, 12 acetic acid, for the manufacture of roller composition, anti-rust coatings, paint, pigments and colours, 13 gall-nuts, iron sulphate, acetic acid and gallic acid, for the manufacture of ink.

R.903 Item 306.06 deletion of tariff heading no. 15.10 Item 306.07 no. 15.07 and 27.07. Item 306.08-27.12, 28.57, 29.22, 36.01, 40.06, 57.06 and 57.08. Item 306.09, 15.05, 15.07 and 15.10; 28.04 and 28.38, 29.14 and 29.15. Item 306.10-29.15 and 35.04.

Note: The provisions for a rebate of duty are withdrawn on – 1 fatty acids of mafurra, soya bean or cotton seed oils, for the manufacture of soap, detergents and candles, 2 rape seed oil, linseed oil and coal tar naphtha, for the manufacture of polish and cream, 3 petroleum jelly, sodium azide, dimethylaniline and gunpowder, for the manufacture of explosives and pyrotechnical goods, 4 rubber compounds and yarn of jute or of other textile bast fibres of heading no. 57.03 of Schedule no. 1 for the manufacture of safety fuse, 5 paper yarn, for the manufacture of igniter cord, 6 crude wool grease, linseed oil, fatty acids, red phosphorous, iron sulphate, benzoic acid, acetic acid and naphthalic acid, for the manufacture of disinfectants, insecticides, fungicides, herbicides and allied products, 7 adipic acid, for the manufacture of plasticisers, 8 peptones, for the preparation of culture media for micro-organisms.

GENERAL REBATES

R.904 Item 408.02 no. 87.02 extent of rebate – full duty less 20 per cent. 94.00 – full duty. Provision is made for a rebate of the full duty on furniture (excluding that specified in tariff heading no. 94.04 of schedule 1) imported by a permanently physically disabled person subject, in each case, to a permit issued by the secretary and the conditions imposed by him: Provided that it is except with the permission of the secretary, not sold or disposed of within a period of 2 years after the date of entry.

Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

Spain

Aluminium: duty free import quota. The Spanish *State Gazette*, 1 June, published royal decrees 1198 and 1199/1977 of the Ministry of Commerce announcing the following duty free import quotas:

CCCN	Description	Quota in tonnes
76.01.B	Aluminium waste and scrap	5 000
76.03	Wrought plates, sheets and strip of aluminium, with a thickness of at least 0.20 mm	6 500

The above quotas are valid for a period of six months from 1 June 1977 and will be allocated by the Ministry of Commerce.

Inquiries: OTAR 01-248 5757 ext. 462/471/472/473.

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Extensions to **OTAR** numbers are given at the end of each notice

Sweden

Increase in soft drinks and beer taxes. With effect from 1 May the taxes on soft drinks and beer have been increased to the following rates:

CCCN no.		Rate of tax in Swedish Kronor	Unit
22.01			
101	Carbonated soft drinks	60	100 litres
ex 22.02	Beverages ready for consumption and containing not more than 2.25% of alcohol by volume, but not chocolate, coffee or tea:		
ex 001	Carbonated soft drinks	60	100 litres
ex 009	Other soft drinks	37	100 litres
22.03	Beer made from malt:		
	Alcoholic content by weight:		
101, 201, 901,	Not exceeding 1.8% (light beer)	45	100 litres
103, 203, 903	Exceeding 1.8% but not 2.8% (Type A beer)	135	100 litres
104, 204, 904,	Exceeding 2.8% but not 3.6% (Type B beer)	235 plus 4	100 litres
105, 205, 905,	Exceeding 3.6% (strong beer)	340 plus 5	100 litres
ex 22.07	Beverages ready for consumption and containing not more than 2.25% of alcohol by volume:		
	Sparkling	60	100 litres
	Other	37	100 litres
22.09	Spirits		
	Carbonated	60	100 litres
	Other	37	100 litres

Inquiries: OTAR 01-248 5757 ext. 458/461.

Thailand

Special import fee on telephone receivers. The Thai Board of Investment have issued notice 12/2520 whereby a special fee of 25 per cent of the cif price is placed on the import of telephone receivers under CCCN 85.13, exclusive of component parts and accessories imported for use in the local telephone receiver assembling industry.

The term 'telephone receiver' shall include the telephone receiver with base and/or housing and necessary parts from any two or more of the following:

1 Bell or buzzer; 2 Switching device; 3 Dial.

The Board of Investment shall determine which imports fall into this category so as to protect industries which have promotional privileges.

This notice came into effect on 26 April and remains in force until 25 April 1978.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Special import fee on scientific laboratory glassware. The Thai Board of Investment have issued notice 13/2520 whereby a special fee of 30 per cent of cif price is placed on the import of scientific laboratory glassware under CCCN 70.17a; except volumetric glassware, pipettes, burettes and measuring cylinders.

The Board of Investment shall determine which imports fall into this category, so as to protect industries which have promotional privileges.

This notice came into effect on 4 May and remains in force until 3 May 1978.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Zaire

Import restrictions. An official decree has recently been published which prohibits the importation of the following items:

CCCN no.	Description
Part 51.04 and 56.07	Synthetic fabric of polyester and wool
Part 51.04 and 56.07	Synthetic fabrics of 100 per cent polyester or other materials
Part 61.01 and 56.07	Trousers and short-sleeved suits
Part 61.03 and 56.07	Shirts
Part 61.10 and 56.07	Socks

Inquiries: OTAR 01-248 5757 ext. 472/462/471/473.

Item	Description	Special conditions
9990	Benzyl chloride, Bromostyrene, Chlorobenzene, 1:4 Dichloronapthalene, Para-dichlorobenzene, Vinyl Chloride	
51.01 2020	Monofilament of synthetic fibres not prepared for retail sale.	
2030	Yarn of synthetic fibres combined with lurex yarn or similar type in any percentage not prepared for retail sale.	
82.05 2000	Oil well drilling or sounding tools	
2500	Tools for thread rolling dies	
3000	Thread milling cutters	
5500	Tools made of sintered metal carbides or having working bits made of sintered metal carbides for pressing bolts, wire or screws.	

Item 58.04 3000 – 'with strips parallel – the selvedges produced in the weaving process, of a weight not exceeding 380 gm per m^2 and including 80 per cent or more cotton' has been deleted from the liberalised list and will now require an import licence.

Notes:

1 'Licensed to Trade in Drugs' means that the importer is in possession of a licence to trade or to manufacture drugs or medicines issued to him in accordance with the Trades and Industries (Regulation) ordinance.

2 'Special Authority' means that the importer is in possession of a special authority issued to him by a competent authority to import goods as specified in his licence and subject to the conditions, specified therein, if such have been specified.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Jordan

Prohibition of food colorants. *Official Gazette* 2697, 25 April, announced a ruling by the Minister of Health prohibiting the use and import of foodstuffs containing any of the following food dyes:

Fast Yellow AB C I (1956) 13015, (E 105).
Orchil/Oscein C I (1942) 1242, (E 121).
Indanthrene Blue C I (1956) 69800, (E 130).
Black 7984 C I (1971) 27755, (E 130).
Burnt Umber (E 181).

Inquiries: OTAR 01-248 5757 ext. 475/7062.

Malaysia

Import control changes. The Malaysian government has passed the Customs (Prohibition of Imports) (Temporary Protective Measure) (Amendment) (No. 2) Order 1977 which came into force on 18 May so that the following heading numbers may now be imported into West Malaysia without an import licence.

55.05 – Cotton yarn, not put up for retail sale, sub-heading numbers 100 and 900.
55.06 – Cotton yarn put up for retail sale, sub-heading numbers 100, 200, 300 and 900;
56.05 – yarn of man-made fibres (discontinuous or waste) not put up for retail sale, sub-heading numbers 100 and 200.
56.06 – Yarn of man-made fibres (discontinuous or waste) put up for retail sale, sub-heading numbers 100, 190, 200 and 290.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Customs duty amendments. The Malaysian government has passed the Customs Duties (Amendment) (No. 2) Order 1977 which came into force on 18 May and amends the first schedule to the Customs Duties Order 1968 so that it now reads as follows:

Heading	Description	Unit of quantity	Import duty: Federation common tariff
28.04	Hydrogen, rare gases and other non-metals:		
100	Oxygen	Value	20%
29.01	Hydrocarbons:		
300	Acetylene	Value	20%
55.05	Cotton yarn, not put up for retail sale:		
100	Unbleached, not mercerised	Lb	15% or 40 cts per lb on gross weight whichever is the higher
56.05	Yarn of man-made fibres (discontinuous or waste) not put up for retail sale:		
100	Of synthetic fibres	Lb	$2.50 per lb on gross weight
200	Of regenerated fibres	Lb	15% or 40 cts per lb on gross weight whichever is the higher
56.06	Yarn of man-made fibres (discontinuous or waste) put up for retail sale:		
	Of synthetic fibres:		
110	Sewing thread	Lb	$2.50 per lb on gross weight
120	Crochet thread	Lb	15%
130	Embroidery thread	Lb	15%
190	Other	Lb	$2.50 per lb on gross weight
87.06	Parts and accessories of the motor vehicles falling within heading no. 87.01, 87.02 or 87.03:		
	Other:		
970	automobile safety seat belts	Value/no.	35% or $6.00 per piece whichever is the higher

* These duties also apply to Penang.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Import control, carbon black. The Malaysian government has passed the Customs (Prohibition of Imports) (Temporary Protective Measure) (Amendment) Order 1977, which came into force on 12 May and amends the first schedule to the Customs (Prohibition of Imports) (Temporary Protective Measure) Order 1973 by adding the following:

Heading	Description	Country
28.03 100	Carbon black	All countries

Note: The first schedule lists those goods prohibited from entry into West Malaysia without an import licence.

Inquiries: OTAR 01-248 5757 ext. 469/401/468.

Philippines

Change of duty. The President of the Philippines has ordered the following change of import duty with effect from 20 May 1977:

Tariff heading 40-11: Rubber tyres, tyre cases, interchangeable tyre threads, inner tubes and tyre flaps, for wheels of all kinds:	
A For aircraft, tractors, earthmoving equipment, automobiles and trucks	30 per cent
B Other	50 per cent

The change consists in the inclusion of tyres, etc., for automobiles and trucks in sub-section A, thus taking a reduction as above.

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Singapore

Car seat belts. The Singapore government has now announced that all cars and station wagons which are registered on or after 1 January 1978 must be fitted with seat belts for the front seats. The anchorage should be to approved standards (eg British Standards), and should be so indicated on the vehicle. The belts, which should be of the three point lap-sash type, should bear the certification mark of the British Standards Institute (or labelled to show conformity with EEC Regulation No 16).

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

South Africa

Foodstuffs, Cosmetics and Disinfectants Act 1972. R.908 published in South African *Government Gazette* 5565, 27 May, gives details of a regulation issued under the above act regarding labelling and advertising.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries excl. shipping	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index Series in Stock level at end-1976	1970	£ million	£ million			£ million				£ million		
						18,218	10,404	1,830	1,977			
1970	100.0	31 644	9,453	2,130	1,799	442	325	68	−14	733	−25	758
1971	101.7	32,505	9,681	1,991	1,930	99	−148	52	22	1,087	280	807
1972	104.3	34,402	9,870	1,739	2,071	39	−145	48	15	131	−702	833
1973	110.3	36,003	10,279	1,872	2,390	1,127	404	102	382	−752	−2,334	1,582
1974	109.8	35,590	10,124	2,024	2,289	602	666	81	−111	−3,380	−5,221	1,841
1975	107.6	35,234	9,991	1,737	1,970	−680	−392	−111	−23	−1,635	−3,195	1,560
1976	108.9	35,290	9,562	1,651	1,898	−8	−4	22	1	−1,423	−3,592	2,169
1975 1st qtr.	109.4	8,988	2,534	471	492	−125	18	−31	−38	−544	−947	403
2nd qtr.	107.2	8,833	2,474	444	498	−267	−105	−54	−66	−295	−655	360
3rd qtr.	106.5	8,724	2,540	416	501	−208	−234	−29	38	−566	−967	401
4th qtr.	107.4	8,689	2,443	406	480	−80	−70	4	43	−230	−626	396
1976 1st qtr.	109.2	8,811	2,460	402	452	25	31	24	12	−80	−538	458
2nd qtr.	108.3	8,730	2,394	408	479	−97	−115	−22	−55	−439	−919	480
3rd qtr.	108.4	8,824	2,392	418	484	−22	4	10	22	−536	−1,148	612
4th qtr.	109.7	8,925	2,316	422	486	86	86	11	22	−368	−987	619
1977 1st qtr.		8,690 pe		410 p	476 p		208 p	49 p	80 p	−294	−954	660
% change last 2 qtrs. on prev. 2 qtrs.	+0.3	+0.3	−3.0	+0.7	—							
on a year earlier	+2.0	+0.7	−5.5	+3.0	+3.2							

	Industrial production		Personal expenditure		Prices and costs (NOT seasonally adjusted)					Labour (UK)			Visible trade (Volume)	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Basic hourly wage rates of manual workers (all industries and services)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count	Export	Import
	at 1970 prices		at 1971 prices	monthly averages									On a balance of payments basis	
													at 1970 prices	
Base of index £m in base year Series in	1970	1970	1971 15,895	thousands	Jan. 1974		1970	1970	July 1972	thousands		thousands	1970 7,907	1970 7,932
1971	100.5	99.7	100.0	108.5	153.4†	9.4	104.6	109.0	88.9	775.8	3.4	130.9	106.7	104.2
1972	102.7	102.4	105.8	138.6	164.3†	7.1	109.2	114.8	101.4	854.9	3.7	147.3	107.1	116.7
1973	110.3	110.0	110.7	137.1	179.4†	9.2	144.5	123.2	115.6	611.0	2 6	307.0	122.2	133.8
1974	106.4	108.2	109.9	102 8	108.5	16.0	215.3	152.0	138.7	599.7ø	2.6ø	302.7ø	131.2	136.2
1975	101.3	101.7	107.9	97.2	134.8	24.2	235.4	188.7	179.8	929.0	3.9	150.0ø	125.6	126.4
1976	102.2	103.4	108.1	104.7	157.1	16.5	299.0	219.6	214.5	1,269.8ø	5.4ø	120.4ø	135.9	134.2
1976 1st qtr.	101.9	102.0	107.3	103	149.4	22.5	266.5	206.9	205.5	1,220.3	5.2	116.7	131.5	126.1
2nd qtr.	102.4	103.6	107.6	106	154.9	16.0	292.6	214.4	212.8	1,252.1	5.3	119.4	137.1	134.6
3rd qtr.	101.5	103.5	108.9	97	158.5	13.7	306.8	223.2	218.6	1,305.5	5.5	123.6	134.2	137.9
4th qtr.	103.2	104.5	108.5	113	165.8	15.0	329.9	233.9	220.6	1,316.8ø	5.6ø	..	140.8	138.1
1977 1st qtr.	103.3 p	105.4 p	105.0	104	174.1	16.5	341.5 p	248.0 p	224.6 p	1,330.2	5.6		140.3	142.0
1976 May	104.4	106.4	106.8	110	155.2	15.4	292.0	214.8	211.7	1,253.3	5.3	120.0	137.2	134.7
June	100.4	101.1	107.3	91	156.0	13.8	299.6	217.0	216.6	1,261.1	5.3	115.7	138.5	137.1
July	101.4	103.7	108.8	91	156.3	12.9	302.0	219.8	219.0	1,288.9	5.5	118.6	130.4	139.4
Aug.	100.6	102.5	108.9	115	158.5	13.8	304.0	223.4	219.1	1,308.8	5.6	126.2	134.9	133.7
Sept.	102.4	104.4	108.9	86	160.6	14.3	314.4	226.3	219.2	1,318.7	5.6	125.9	137.3	140.4
Oct.	102.8	104.7	108.1	109	163.5	14.7	327.7	230.0	219.5	1,307.9	5.5	124.5	140.8	140.6
Nov.	103.5	104.9	109.2	119	165.8	15.0	331.8	234.6	220.7	..	..	..	138.1	140.1
Dec.	103.3	103.8	108.3	111	168.0	15.1	330.2	237.2	221.5	1,325.7 e	5.6 e	..	143.3	133.6
1977 Jan.	103.4	105.1	106.7	93	172.4	16.6	337.8	244.9	223.8	1,338.2	5.7	..	140.6	153.6
Feb.	103.3	105.7	105.7	118	174.1	16.2	339.5	248.2	224.8	1,331.4	5.6	150.5	138.0	133.7
Mar.	103.1	105.5	103.1	102	175.8	16.7	347.2	250.8	225.2	1,321.1	5.6	157.3	142.9	139.4
Apr.	103.2	104.7	103.4	108	180.3	17.5	349.8	255.4	225.9 p	1,322.6	5.6	158.5	148.8	138.6
May			103½		181.7	17.1	348.1 p	259.6 p		1,315.9 p	5.6 p	161.2 p	145.3 p	142.4 p
% change latest 3 months on prev. 3 months	−0.2	+0.7	−3.5	+1.5	+4.5		+3.7	+4.9	+1.5	−0.9			+3½	–
on a year earlier	+0.9	+2.7	−3.4	+2.5	+17.1		+22.6	+20.6	+8.2	+6.2			+7½	+7½

p Provisional pe Preliminary estimate † Base of index Jan. 1962 = 100 .. not available ø Average of available months e estimate

Inquiries: 01-215 3453

Current account of the United Kingdom balance of payments for April

In May 1977 the current account is estimated to have been in deficit by £24 million. The deficit on trade in goods was £244 million, seasonally adjusted, and the balance on services and other transactions is estimated to have been running at a monthly surplus of about £220 million.

In the three months March to May 1977 there was a current account surplus of £39 million compared with a deficit of £321 million in the previous three months.

£ million seasonally adjusted

	Current balance	Visible balance: Trade in goods	Invisible balance: Services and other current transactions
1975	−1,650	−3,195	+1,545
1976	−1,476	−3,592	+2,116
1976 1st quarter	−121	−538	+417
2nd quarter	−401	−919	+518
3rd quarter	−543	−1,148	+605
4th quarter	−411	−987	+576
1977 1st quarter	−327	−968	+641
1976 December	−22	−214	+192 b
1977 January	−324	−538	+214 b
February	+25	−188	+213 b
March	−28	−242	+214 b
April	+91	−129	+220 a
May	−24	−244	+220 a
1976 Dec-Feb	−321	−940	+619
Mar-May 1977	+39	−615	+654 a

a These figures are or include projections and are subject to revision as information becomes available.
b One third of the appropriate calendar quarter's estimate. Monthly figures of invisibles are not available.

Visible trade

Summary Figures on a balance of payments basis (see tables 1 and 3)

In May, there was a deficit on visible trade of £244 million, seasonally adjusted, £115 million more than the comparatively low April figure and about the same as in March. Erratic movements in the balance of trade in oil accounted for most of the increase in the deficit. Total exports fell by £19 million in May and total imports rose by £96 million.

In terms of volume, exports fell by 2½ per cent and imports rose by 2½ per cent. The export unit value index rose by 2 per cent in May, while the import unit value index was virtually unchanged. The terms of trade index rose by 1½ per cent.

In the *three months ended May*, the visible trade deficit was £615 million compared with £940 million in the previous three months. The balance of trade in oil improved by £126 million, with roughly equal contributions from higher exports and lower imports. Total exports were valued at £7,750 million, 5 per cent higher than in the previous three months with volume up by 3½ per cent. Total imports, at £8,365 million were up only marginally, with volume unchanged. Between the three monthly periods both the export unit value index and the import unit value index increased by 3 per cent.

Exports (overseas trade statistics basis)

Area analysis (see table 4). The value of exports to the developed countries in aggregate was 5 per cent higher in the three months ended May than in the previous three months. Over this period shipments to the EEC, which have increased fairly strongly in each of the last three months, were up by 7½ per cent, while there was a decline of 1 per cent in the value of goods despatched to the rest of Western Europe, partly reflecting erratic movements in trade in diamonds. Exports to North America were 11 per cent higher, despite falling in both April and May. Deliveries to the other developed countries (Australia, New Zealand, South Africa and Japan) fell by 1½ per cent. Exports to the developing countries as a whole rose by 7 per cent, with a rise of 8 per cent in shipments to the oil exporting countries. The value of goods despatched to the centrally planned economies rose by 18 per cent, partly the result of high deliveries of ships in May.

Commodity analysis (see tables 5, 6 and 7). In the three months ended May the value of exports of manufactured goods was 6½ per cent higher than in the previous three months, with a rise of 4½ per cent in the volume of deliveries. Within this broad category, the value of exports of machinery and transport equipment rose by 7½ per cent. The value of machinery exports was 2½ per cent higher, with volume little changed, while deliveries of road motor vehicles rose by 13 per cent in value and shipments of other transport equipment, which often move erratically, rose by 34 per cent. The value of chemicals despatched increased by 5½ per cent, with volume up by 2 per cent. The 8½ per cent increase in the value of exports of metals mainly reflected higher volume. The value of textile exports fell by 1½ per cent, with volume 4 per cent down. The value of other manufactured goods despatched increased by 8 per cent. For non-manufactures, the value of exports in total rose by 2½ per cent. There was a fall of 1 per cent in the value of food, beverages and tobacco exported, and a decline of 9 per cent in the value of shipments of basic materials. Exports of fuels rose by 13 per cent in value in the latest three months, with crude oil exports at £211 million about 70 per cent up on the level of the previous three months (see footnote to Table 12).

Imports (overseas trade statistics basis)

Commodity analysis (see tables 8, 10 and 11). In the three months ended May, the value of imports of food, beverages and tobacco rose by 9½ per cent compared with the previous three months, reflecting broadly equal increases in price and volume. Between the same periods, the value of fuel imports fell by 6 per cent, a 9½ per cent fall in volume partly offset by a 3 per cent rise in price. The fall in volume reflects both the build up of North Sea oil production and a run down of stocks. Imports of industrial materials in total fell by 2½ per cent in value, a 5 per cent fall in volume outweighing a 3 per cent rise in price. Within the group the 11 per cent fall in the value of basic materials imports and the 2½ per cent fall in the value of imports of chemicals both reflected lower volume.

Imports of other semi-manufactures rose by 2 per cent in value terms, although volume fell by 3 per cent. Imports of finished manufactures in aggregate fell by 2 per cent in value with volume down by

TABLE 1 Visible trade on balance of payments basis

Seasonally adjusted values — £ million

	Exports (fob)	Imports (fob)	Visible balance
1975	19,379	22,574	−3,195
1976	25,294	28,886	−3,592
1975 1st quarter	4,644	5,591	−947
2nd quarter	4,611	5,266	−655
3rd quarter	4,808	5,775	−967
4th quarter	5,316	5,942	−626
1976 1st quarter	5,611	6,149	−538
2nd quarter	6,209	7,128	−919
3rd quarter	6,400	7,548	−1,148
4th quarter	7,074	8,061	−987
1977 1st quarter r	7,415	8,383	−968
1976 December	2,448	2,662	−214
1977 January r	2,479	3,017	−538
February r	2,437	2,625	−188
March r	2,499	2,741	−242
April r	2,635	2,764	−129
May p	2,616	2,860	−244
1976 Dec-Feb	7,364	8,304	−940
Mar-May 1977	7,750	8,365	−615
Percentage change*	+5	+½	

p Provisional estimates. r Revised estimates.
* Percentage change: latest three months on previous three months.

TABLE 2 Invisibles¶

Seasonally adjusted values — £ million

	Credits	Debits	Invisible balance
1975	11,076	9,531	+1,545
1976	13,703	11,587	+2,116
1975 1st quarter	2,658	2,252	+406
2nd quarter	2,712	2,366	+346
3rd quarter	2,786	2,398	+388
4th quarter	2,920	2,515	+405
1976 1st quarter	3,060	2,643	+417
2nd quarter	3,279	2,761	+518
3rd quarter	3,594	2,989	+605
4th quarter	3,770	3,194	+576
1977 1st quarter	3,802	3 161	+641
April			+220*
May			+220*

¶ See note 6.
* These figures are projections and are subject to revision as the relevant statistical information becomes available.

TABLE 3 Export and import unit value and volume index numbers on a balance of payments basis

Indices 1970 = 100

	Unit values (not seasonally adjusted)			Volume (seasonally adjusted)	
	Exports	Imports	Terms of trade †	Exports	Imports
1975	198.5	245.0	81.0	125.6	126.4
1976	240.6	299.4	80.4	135.9	134.2
1975 1st quarter	184.9	239.8	77.1	128.8	127.9
2nd quarter	193.4	240.4	80.4	122.6	122.0
3rd quarter	202.2	246.4	82.1	121.3	128.3
4th quarter	210.1	259.7	80.9	129.6	127.4
1976 1st quarter	219.0	268.3	81.6	131.5	126.1
2nd quarter	234.2	291.7	80.3	137.1	134.6
3rd quarter	247.4	307.3	80.5	134.2	137.9
4th quarter	261.7	330.0	79.3	140.8	138.1
1977 1st quarter r	274.5	340.7	80.6	140.7	142.4
1976 December	266.9	335.4	79.6	143.3	133.6
1977 January r	272.7	336.7	81.0	141.0	153.9
February r	273.9	340.1	80.5	138.3	133.8
March r	276.8	345.2	80.2	142.9	139.4
April r	277.4	348.7	79.6	148.8	138.6
May p	282.4	349.1	80.9	145.3	142.4
1976 Dec-Feb	271.2	337.4	80.4	140.9	140.4
Mar-May 1977	278.9	347.7	80.2	145.7	140.1
Percentage change	+3	+3	—	+3½	—

† Export Unit Value Index as a percentage of the import unit value index.
p Provisional estimates.
r Revised estimates.

3½ per cent and prices up by 1 per cent. Within the group imports of machinery were little changed in both value and volume terms. In contrast, there were rises of 10 per cent and 17 per cent respectively in the value of imports of road motor vehicles and other transport equipment, with the volume of these two groups combined rising by 9½ per cent. Arrivals of other finished manufactures fell by 6 per cent in value and 5 per cent in volume.

Area analysis (see table 9) The value of imports from the developed countries rose by ½ per cent in the three months ended May compared with the previous three months. Imports from the EEC which, like exports to the community, have increased fairly strongly in each of the last three months, rose by 3½ per cent, while imports from the rest of Western Europe fell by 3½ per cent, partly reflecting erratic movements in trade in diamonds. Imports from North America have changed little during the past three months, and were 4½ per cent down on the three monthly comparison. Arrivals from the other developed countries rose by 3½ per cent. Among the developing countries, there was a 2½ per cent fall in shipments from the oil exporting countries, while imports from the other developing countries were little changed. Deliveries from the centrally planned economies fell by 9½ per cent, mainly the result of an erratically high January figure.

Invisibles (see table 2)

The latest estimate of invisibles relates to the first quarter of 1977 when credit on services and other transactions were £3,802 million and debits £3,161 million, giving a surplus of £641 million for the quarter. The surplus is projected to be running currently at £220 million a month

Notes

1 Trade figures on a balance of payments basis. The seasonally adjusted import and export figures on a balance of payments basis are obtained by making various adjustments to the seasonally adjusted figures derived from those recorded in the monthly *Overseas Trade Statistics*. These adjustments are summarised in Table 13. Some are valuation adjustments; the principal of these is the deduction from the import figure of freight and insurance costs. The other adjustments relate to coverage. Included under this heading are adjustments to bring in items not in the Trade Statistics (for example on the import side ships built and delivered abroad direct to UK owners) and to remove items which are in the Trade Statistics (mainly returned goods and goods for processing and repair), where no change of ownership is involved. In addition adjustments are made from time to time to the level of exports to take account of variations in the quality of recording as revealed by the regular monitoring of the accuracy of the export figures (as described in an article in *Trade and Industry*, 15 February 1973). All these adjustments are described in greater detail in the annual '*Pink Book*' *United Kingdom Balance of Payments 1965-75* (table 4 and pages 59-62) and in an article in the issue of *Trade and Industry*, 4 November 1970.

Since firm figures for the adjustments do not become available as quickly as recorded trade statistics, the figures for imports and

TABLE 4 Exports: areas¶ Overseas Trade Statistics basis

Seasonally adjusted values — £ million fob

	Total	Developed countries				Developing countries		Centrally planned economies
		EEC	Rest of W. Europe	North America	Other	Oil exporting countries	Other	
1976	25,778	9,174	4,275	3,098	1,943	3,143	3,362	727
1976 2nd quarter	6,310	2,246	1,053	773	472	751	807	183
3rd quarter	6,500	2,342	1,061	797	490	786	837	182
4th quarter	7,228	2,628	1,247	837	481	911	909	187
1977 1st quarter	7,562	2,763	1,297	886	537	997	887	201
1977 March	2,522	943	382	330	169	344	295	66
April r	2,734	970	455	314	175	350	351	73
May p	2,711	1,019	499	290	174	355	318	92
1976 December-February	7,532	2,724	1,346	840	527	972	911	196
March-May 1977	7,967	2,932	1,335	934	518	1,049	964	231
Percentage change	+6	+7½	−1	+11	−1½	+8	+5½	+18

¶ See Note 2. r Revised estimates. p Provisional estimates.

exports on a balance of payments basis in the latest months are at this stage preliminary estimates and liable to revision.

2 The adjustments described at note 1 are made only for the monthly totals of exports and imports (table 1) and the monthly figures of trade in petroleum and petroleum products (table 12). They are not estimated for the area and other commodity analysis of trade. The values of total trade and the main components of exports and imports in tables 4 to 11 are available only on the *Overseas Trade Statistics* basis. Whereas comment on total trade and trade in petroleum and petroleum products relates to figures for exports and imports on a balance of payments basis, analysis of the area and other commodity patterns of trade are based on the figures on the *Overseas Trade Statistics* basis in tables 4 to 11. The main components of trade are seasonally adjusted independently from the totals and in consequence do not always add exactly to the seasonally adjusted totals.

3 Visible balance. The visible balance is the difference between the import and export figures on a balance of payments basis obtained as described in note 1 above. Since, as noted above, the import and export figures for the most recent months are provisional, it follows that the monthly visible balances for these months are also provisional and liable to revision.

The monthly figures for the visible balance are published only on a seasonally adjusted basis. Since the balance is the difference of two large and variable figures, it is itself liable to fluctuation and undue significance should not be attached to a single month's figure; it is more useful to consider the total balance over three or more months.

4 Trends. Even after allowing for seasonal influences, the sequence of monthly figures is usually too variable to give a satisfactory indication of the underlying trend. While it is possible to construct elaborate estimates of trend these cannot be applied to the most recent months, and a simple method of giving some guidance on underlying movements in the most recent past is to take the sum of three months. Apart from occasions when major disturbances distort the flows of trade, the three-monthly total gives a quite good short-term guide and has the merit of simplicity.

5 Timing. The figures for exports relate to documents received in the Statistical Office of HM Customs and Excise up to a few days before the end of the calendar month. On average export documents arrive at Customs Statistical Office within a fortnight of the shipment of goods, so that the documents relate to goods passing through the ports in the month ending about the middle of the calendar month to which they are attributed. The figures for imports relate to documents received at the Customs Statistical Office up to the third working day after the end of the month. Importers are usually required to present their documents before they can obtain customs clearance and remove the goods. Thus the import statistics correspond closely to movements through the ports during the calendar month to which they are attributed.

6 Invisibles (services and other current transactions) covers the following items: Government services and transfer payments; all other services including sea and air transport, travel and insurance, banking and other financial transactions; overseas income in the form of interest, profits and dividends; and private transfers. The monthly figures are inevitably less precise than those for visible trade for several reasons; the data are not available on a

TABLE 5 Exports: commodity classes¶ Overseas Trade Statistics basis

Seasonally adjusted values — £ million fob

					Manufactures									
						Machinery and transport equipment								
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road motor vehicles	Other transport equipment*	Chemicals	Metals and miscellaneous metal manufactures	Textiles	Other manufactures	Miscellaneous
1976	*25,778*	*1,694*	*776*	*1,255*	*21,347*	*10,126*	*7,062*	*2,224*	*840*	*3,047*	*2,347*	*934*	*4,892*	*707*
1976 2nd quarter	6,310	406	182	286	5,229	2,514	1,741	553	203	733	575	223	1,228	170
3rd quarter	*6,500*	*419*	*197*	*333*	*5,414*	*2,530*	*1,753*	*561*	*200*	*783*	*635*	*240*	*1,204*	*178*
4th quarter	7,228	472	232	395	5,913	2,735	1,910	601	246	860	653	267	1,397	183
1977 1st quarter	*7,562*	*504*	*251*	*479*	*6,169*	*2,764*	*1,951*	*623*	*203*	*899*	*684*	*287*	*1,527*	*193*
1977 March	2,522	160	78	166	2,090	947	650	224	83	310	233	96	485	69
April r	*2,734*	*158*	*81*	*186*	*2,208*	*998*	*676*	*210*	*79*	*313*	*256*	*95*	*587*	*92*
May p	2,711	185	70	153	2,237	1,024	689	235	124	313	244	90	595	55
1976 Dec-Feb	*7,532*	*508*	*251*	*445*	*6,130*	*2,763*	*1,971*	*592*	*214*	*885*	*676*	*286*	*1,540*	*182*
Mar-May 1977	7,967	503	228	504	6,536	2,969	2,016	669	286	936	733	281	1,667	216
Percentage change	+6	−1	−9	+13	+6½	+7½	+2½	+13	+34	+5½	+8½	−1½	+8	+19

* Not seasonally adjusted. ¶ See Note 2. p Provisional estimates. r Revised estimates.

TABLE 6 Exports: volume indices Overseas Trade Statistics basis

Seasonally adjusted — *Indices 1970 = 10*

					Manufactures							
						Machinery and transport equipment						
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road motor vehicles and other transport equipment	Chemicals	Metals and miscellaneous metal manufactures	Textiles	Other manufactures
Weights	*1,000*	*64*	*34*	*26*	*844*	*410*	*276*	*134*	*97*	*119*	*49*	*169*
1976	139.4	156	122	108	140	133	135	130	171	108	124	168
1976 2nd quarter	140.3	151	119	104	141	135	135	130	167	110	122	173
3rd quarter	137.3	152	118	114	139	130	132	124	171	114	126	161
4th quarter	144.6	161	131	121	144	134	134	136	180	111	130	176
1977 1st quarter	144.3	165	138	134	144	129	131	126	176	118	132	184
1977 March	145.0	158	126	137	147	133	131	143	180	122	130	177
April	155.4	151	128	152	154	137	135	128	183	134	131	213
May p	151.1	165	111	123	152	139	137	154	179	125	124	205
1976 December-February	144.9	167	139	129	144	129	134	121	177	117	134	187
March-May 1977	150.5	158	122	137	151	136	134	141	181	127	129	198
Percentage change	*+4*	*−5*	*−13*	*+6½*	*+4½*	*+5½*	*+½*	*+17*	*+2*	*+8½*	*−4*	*+6*

p Provisional estimates.

monthly basis (some are reported quarterly, others less frequently) and the figures are, therefore, essentially projections based on past trends; revisions, affecting particularly gross credits and debits, but often the balance as well, are more frequent; and the gross figures themselves include a number of items which are appropriately recorded as the net profit or surplus arising on the transactions.

7 Trade in petroleum and petroleum products. Trade in petroleum and petroleum products (table 12) accounts for almost all the trade in fuels, section 3 of SITC(R) which is included in tables 5 and 8. Import and export figures are shown for crude oil and for the rest of the division which includes petroleum partly refined for further refining and petroleum products (eg motor spirit, lamp oil and white spirit, distillate fuels, residual fuel oils, lubricating oils and greases, etc).

The figures of value and tonnage of crude oil imports in table 12 are based on reports to HM Customs and Excise and have been seasonally adjusted with the same seasonal and length of month factors as have been used for the Fuels total in table 8. These figures cannot be directly compared with the monthly import tonnages originating from the Department of Energy which are published in the *Monthly Digest of Statistics* and the *Digest of Energy Statistics*, as the latter are based on reports received directly from the oil industry and are unadjusted. Over longer periods the differences between the two sources are largely resolved.

For imports, the average value of crude oil per ton has been obtained by dividing the value of crude oil imports by the tonnage and will reflect not only changes in price but also changes in the commodity mix of imports due, for example, to differing qualities of crude oil.

The figures of value of crude oil exports have been seasonally adjusted with the same seasonal and length of month factors as have been used for the fuels total in table 5. These figures include oil which has been re-exported.

8 Unit value and volume indices. A brief description of the way in which the index numbers on a balance of payments basis are calculated was published in the article giving unit value and volume index numbers for March 1971 in *Trade and Industry* of 26 May 1971. An article was published in *Trade and Industry* on 11 October 1973 introducing the series of import and export unit value and volume indices with 1970 = 100. The purpose of the index numbers is to measure the changes in price and volume of our imports and exports. Index numbers can be constructed in various ways, and the series used here are of the fixed base type. Thus, the unit value indices measure changes in 'price' of a fixed selection of trade headings (although in practice it is not specific prices which are measured but the average price of all the varying transactions taking place each month in the selected headings, reflecting different kinds of goods covered by each heading and different markets or sources of supply).

Correspondingly, the volume indices measure, for the same selection of trade headings, what the change in the value of trade would be assuming no changes in the prices charged from those in the base year. Because the indices are base weighted, they do not take account of the changes in the pattern of trade since the base year, and consequently their product does not precisely account for the change in the value of trade expressed as an index. In practice, though, since the composition of trade changes little between consecutive months, the product of the changes in the indices will often approximate to the change in the value of trade between one month and the next. A full methodological article about the 1970-based series of indices was published in the April 1975 issue of *Economic Trends*. Adjustments have been made to the import volume index to

TABLE 7 Exports: unit value indices Overseas Trade Statistics basis

Not seasonally adjusted — Indices 1970 = 100

					Manufactures							
						Machinery and transport equipment						
	Total	Food, beverages and tobacco	Basic materials	Fuels	Total	Total	Machinery	Road motor vehicles and other transport equipment	Chemicals	Metals and miscellaneous metal manufactures	Textiles	Other manufactures
1976	240.1	213	240	553	234	245	250	234	238	228	202	221
1976 2nd quarter	234.3	211	229	530	229	242	248	230	232	216	196	213
3rd quarter	247.4	220	249	553	242	254	258	246	245	233	207	226
4th quarter	261.7	229	262	608	256	269	273	260	259	247	222	239
1977 1st quarter	274.4	238	276	643	268	284	288	275	272	255	235	249
1977 March	276.7	242	282	658	270	285	290	276	276	257	238	249
April	277.2	248	287	636	271	285	286	282	278	259	238	250
May p	282.1	251	284	679	275	288	288	290	282	261	244	258
1976 December-February	271.1	234	270	630	265	281	285	273	269	252	231	246
March-May 1977	278.7	247	284	658	272	286	288	283	279	259	240	252
Percentage change	+3	+5½	+5½	+4½	+2½	+2	+1	+3½	+4	+2½	+4	+2½

p Provisional estimates

TABLE 8 Imports: commodity classes¶ Overseas Trade Statistics basis

Seasonally adjusted values — £ million cif

				Industrial materials				Finished manufactures						
									Machinery and transport equipment**					
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery**	Road motor vehicles	Other transport equipment*	Other	Miscellaneous
1976	31,213	4,993	5,652	11,296	3,223	2,000	6,073	8,860	6,389	4,637	1,398	354	2,471	412
1976 2nd quarter	7,678	1,250	1,346	2,735	760	486	1,489	2,151	1,572	1,180	325	99	579	117
3rd quarter	8,110	1,266	1,493	2,904	856	515	1,532	2,344	1,716	1,255	392	64	628	107
4th quarter	8,744	1,406	1,511	3,239	929	568	1,743	2,543	1,831	1,293	416	96	713	92
1977 1st quarter	8,954	1,490	1,390	3,376	988	629	1,758	2,666	1,897	1,289	474	124	769	105
1977 March	2,875	512	447	1,024	306	200	518	875	634	436	167	46	241	36
April r	3,010	511	423	1,154	280	207	667	845	607	435	159	27	238	38
May p	3,134	528	487	1,155	294	196	665	876	634	438	166	49	242	39
1976 Dec-Feb	8,986	1,417	1,444	3,422	988	618	1,816	2,649	1,882	1,295	447	104	767	100
Mar-May 1977	9,020	1,551	1,357	3,334	880	604	1,850	2,596	1,875	1,309	492	123	721	113
Percentage change	+½	+9½	−6	−2½	−11	−2½	+2	−2	−½	+1	+10	+17	−6	+13

* Not seasonally adjusted. ¶ See note 2. r Revised estimates p Provisional estimates. ** Includes North Sea production installations.

include North Sea oil production installations, however no changes have been made to the base-weighted unit value index.

9 Definition of areas. The areas used in tables 4 and 9 comprise the following countries:

EEC – West Germany, Netherlands, Belgium, Luxembourg, France, Italy, Denmark and Irish Republic.

Rest of Western Europe – Finland, Sweden, Norway, Iceland, Switzerland, Liechtenstein, Portugal, Austria, Andorra, Vatican City, Greece, Turkey, Yugoslavia, Spain, Faroe Islands, Gibraltar, Malta, Continental Shelf (Foreign Part).

North America – USA, Canada, Puerto Rico, Greenland, St Pierre and Miquelon.

Other Developed Countries – Australia, New Zealand, Japan and South Africa.

Centrally Planned Economies – Soviet Union, Poland, East Germany, Hungary, Czechoslovakia, Albania, Bulgaria, Romania, China, North Korea, Outer Mongolia and Vietnam.

Oil Exporting Countries – Abu Dhabi, Algeria, Bahrein, Brunei, Dubai, Ecuador, Gabon, Indonesia, Iran, Iraq, Kuwait, Libya, Nigeria,

TABLE 9 Imports: areas¶ Overseas Trade Statistics basis

Seasonally adjusted values — £ million cif

		Developed countries				Developing countries		
	Total	EEC	Rest of W. Europe	North America	Other	Oil exporting countries	Other	Centrally planned economies
1976	31,213	11,396	4,584	4,219	2,124	4,210	3,514	1,133
1976 2nd quarter	7,678	2,887	1,083	1,023	498	964	869	301
3rd quarter	8,110	2,828	1,231	1,122	578	1,179	912	274
4th quarter	8,744	3,245	1,283	1,191	619	1,135	969	282
1977 1st quarter	8,954	3,343	1,287	1,268	635	1,027	1,123	325
1977 March	2,875	1,104	382	390	199	366	359	99
April r	3,010	1,154	455	397	249	299	330	90
May p	3,134	1,207	471	405	219	349	382	102
1976 Dec-Feb	8,986	3,348	1,357	1,251	644	1,042	1,073	322
Mar-May 1977	9,020	3,466	1,307	1,193	668	1,014	1,072	291
percentage change	+½	+3½	−3½	−4½	+3½	−2½	—	−9½

¶ See note 2. p Provisional estimates. r Revised estimates.

TABLE 10 Imports: volume indices
Overseas Trade Statistics basis

Seasonally adjusted — Indices 1970 = 100

				Industrial materials				Finished manufactures				
									Machinery and transport equipment**			
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery**	Road motor vehicles and other transport equipment	Other
Weights	1,000	227	105	427	151	60	216	229	166	133	33	63
1976	133.5	101	87	127	93	150	145	196	197	186	241	193
1976 2nd quarter	134.1	101	87	126	92	148	144	193	196	189	244	186
3rd quarter	135.8	103	88	127	95	153	142	202	206	194	251	193
4th quarter	137.8	104	85	132	94	157	151	206	210	196	247	197
1977 1st quarter	139.6	107	76	135	97	170	152	213	213	194	283	215
1977 March	133.4	108	71	122	90	161	134	206	208	191	296	202
April r	139.2	108	68	134	82	171	161	198	198	190	256	199
May p	143.4	110	79	134	85	158	161	212	216	199	320	200
1976 Dec-Feb	140.0	104	80	137	97	168	156	213	213	196	265	211
Mar-May 1977	138.7	109	73	130	86	164	152	205	207	194	291	200
Percentage change	−1	+5	−9½	−5	−12	−2½	−3	−3½	−3	−1	+9½	−5

p Provisional estimates. r Revised estimates. ** Includes North Sea production installations.

TABLE 11 Imports: unit value indices
Overseas Trade Statistics basis

Not seasonally adjusted — Indices 1970 = 100

				Industrial materials				Finished manufactures				
									Machinery and transport equipment			
	Total	Food, beverages and tobacco	Fuels	Total	Basic materials	Chemicals	Other semi-manufactures	Total	Total	Machinery	Road motor vehicles and other transport equipment	Other
1976	288.6	247	704	239	260	267	217	237	232	227	253	249
1976 2nd quarter	281.4	243	686	230	248	262	210	234	230	225	251	242
3rd quarter	296.4	246	728	247	266	274	226	246	242	237	262	258
4th quarter	318.9	268	768	268	295	296	240	265	258	251	287	284
1977 1st quarter	327.6	280	790	277	310	302	248	264	258	248	297	280
1977 March	331.9	284	806	280	311	303	251	266	259	248	303	285
April r	335.4	290	801	285	313	303	260	268	261	251	302	287
May p	336.1	296	803	284	314	304	257	266	259	249	302	285
1976 Dec-Feb	325.0	275	781	275	308	300	245	265	258	249	292	282
Mar-May 1977	334.5	290	803	283	313	304	256	267	260	249	303	286
Percentage change	+3	+5½	+3	+3	+1½	+1	+4½	+1	+½	—	+3½	+1½

p Provisional estimates. r Revised estimates.

Oman, Qatar, Saudi Arabia, Sharjah, etc, Trinidad and Tobago, and Venezuela.
Other Developing Countries – All other countries.

10 Seasonally adjusted import figures for December and January. Because of difficulties of allowing fully in the seasonal adjustment procedure for the effects of the 1976/77 Christmas/New Year holiday period, the seasonally adjusted imports figures for December are probably understated and those for January correspondingly overstated. Exports are probably little affected.

11 Revisions to trade figures. As a result of later and more complete information the previously published figures of imports and exports on a balance of payments basis have been revised. The upwards revision to the import figure for April reflects, in part, later information on imports of North Sea oil production installations. In addition the Central Statistical Office estimates of the invisible balance have been revised downwards for 1975 and 1976 by £15 million and £50 million respectively.

Overseas Trade Statistics

Detailed particulars of United Kingdom imports and exports for May with cumulative totals will be published on 29 June* and further analysis of the figures will be found in tables 14.1 to 14.19 in the *Monthly Digest* for June†, due to be published in the second week of July.

Inquiries: 01-215 3131 – Value data and 01-215 3466 – Indices.

* *Overseas Trade Statistics of the United Kingdom*, published by HMSO, price £6.50 (annual subscription £93.60).
† *Monthly Digest of Statistics* published by HMSO, price £1.95 (annual subscription, including supplement of definitions and postage £27.86).

TABLE 12 Trade in petroleum and petroleum products¶ On a Balance of Payments basis (Division 33 of SITC(R))

Seasonally adjusted

	Balance of visible trade	Imports				Rest of Division 33	Exports		Rest of Division 33
		Total	Crude oil				Total	Crude oil	
	£ million fob	£ million fob	£ million fob	million tons	Average value per ton £ fob	£ million fob	£ million fob	£ million fob	£ million fob
1975	−3,106	3,827	3,069	85.6	35.9	758	721	30	691
1976	−3,964	5,126	4,092	85.7	47.8	1,034	1,162	177	985
1975 1st quarter	−774	949	759	22.2	34.3	190	175	7	168
2nd quarter	−682	840	696	20.7	33.8	144	158	2	156
3rd quarter	−785	976	800	22.4	35.6	176	191	5	186
4th quarter	−865	1,062	814	20.3	40.2	248	197	16	181
1976 1st quarter	−960	1,179	929	21.5	43.4	250	219	18	201
2nd quarter	−957	1,219	956	20.6	46.5	263	262	25	237
3rd quarter	−1,043	1,355	1,080	21.8	49.6	275	312	44	268
4th quarter	−1,004	1,373	1,127	21.8	51.9	246	369	90	279
1977 1st quarter r	−817	1,268	1,011	18.8	53.8	257	451	162	289
1976 December	−331	455	370	7.0	52.6	85	124	29	95
1977 January r	−358	503	390	7.4	52.6	113	145	44	101
February r	−204	354	285	5.3	53.6	69	150	51	99
March r	−255	411	336	6.1	55.2	75	156	67	89
April	−211	387	301	5.5	54.7	86	176	94	82
May øp	−302	446	357	6.5	55.1	89	144	50	94
1976 Dec-Feb	−894	1,312	1,044	19.7	52.9	268	418	124	295
Mar-May 1977	−768	1,244	993	18.1	55.0	251	476	211	265
Percentage change		−5	−5	−8½	+4	−6½	+14	+70	−10

p Provisional estimates. ¶ See note 7. r Revised estimates
ø The low figure for exports of crude oil in May partly reflects an irregular movement in the flow of documents to the Customs Statistical Office (see note 5)

TABLE 13 Derivation of the visible trade figures on a balance of payments basis

£ million

	Exports				Imports				
	Recorded	Seasonally adjusted†			Recorded	Seasonally adjusted†			
	Overseas Trade Statistics basis (fob)	Overseas Trade Statistics basis (fob)	Coverage adjustments	Balance of Payments basis (fob)	Overseas Trade Statistics basis (cif)	Overseas Trade Statistics basis (cif)	Adjustments to BOP basis: Valuation adjustments	Adjustments to BOP basis: Coverage adjustments	Balance of payments basis (fob)
1975	19,922	19,922	−543	19,379	24,128	24,128	−1,580	+26	22,574
1976	25,778	25,778	−484	25,294	31,213	31,213	−2,006	−322	28,886
1975 1st quarter	4,593	4,748	−104	4,644	5,883	5,950	−370	+11	5,591
2nd quarter	4,942	4,722	−111	4,611	5,832	5,573	−375	+68	5,266
3rd quarter	4,796	4,962	−154	4,808	5,998	6,190	−417	+2	5,775
4th quarter	5,591	5,490	−174	5,316	6,415	6,415	−418	−55	5,942
1976 1st quarter	5,818	5,740	−129	5,611	6,820	6,681	−435	−97	6,149
2nd quarter	6,393	6,310	−101	6,209	7,776	7,678	−502	−48	7,128
3rd quarter	6,260	6,500	−100	6,400	7,805	8,110	−525	−37	7,548
4th quarter	7,307	7,228	−154	7,074	8,812	8,744	−543	−140	8,061
1977 1st quarter r	7,674	7,562	−147	7,415	9,089	8,954	−549	−22	8,383
1976 December	2,519	2,493	−45	2,448	2,891	2,907	−178	−67	2,662
1977 January r	2,345	2,533	−54	2,479	3,011	3,226	−197	−12	3,017
February r	2,390	2,506	−69	2,437	2,740	2,853	−172	−56	2,625
March r	2,940	2,522	−23	2,499	3,338	2,875	−180	+46	2,741
April r	2,575	2,734	−99	2,635	2,928	3,010	−179	−67	2,764
May p	2,966	2,711	−95	2,616	3,306	3,134	−193	−82	2,860
1976 Dec-Feb	7,254	7,532	−168	7,364	8,642	8,986	−547	−135	8,304
Mar-May 1977	8,481	7,967	−217	7,750	9,572	9,020	−552	−103	8,365
Percentage change	+17	+6		+5	+11	+½			+½

† Components and totals are rounded independently. p Provisional estimates. r Revised estimates

Wholesale price indices in May

Output prices

The provisional price index for the home sales of manufactured products increased by 1¾ per cent in May to 259.6 (1970 = 100).

The index for manufactured products other than food, drink and tobacco increased by 1½ per cent. Higher prices for vehicles accounted for more than a quarter of the increase. This index has increased by 4 per cent in the latest three months compared with 3½ per cent in the corresponding period last year.

Price increases for motor cars and commercial vehicles were mainly responsible for the 4½ per cent increase in the vehicles industry index. They also accounted for over a half of the 2 per cent rise in the index for the engineering and allied industries sector. Of the non-food industries in the latest three months, the index for vehicles has shown the largest increase of 6½ per cent.

The index for the pottery and glass industries has also shown a large increase, of 6 per cent, since February mainly as a result of large price rises for most glass products.

Higher prices for paint made the most significant contribution to the 1¼ per cent increase in May in the index for chemicals and allied industries.

Widespread price rises were responsible for the increases of 1¾ and 1½ per cent respectively in the instrument and electrical engineering sectors, whilst the 1½ per cent [illegible] in the bricks, cement etc industries index was mainly d[illegible] prices for building bricks and to a lesser extent precast c[illegible].

The rise of 2¼ per cent in the index for the food manufacturing industries was due to price incr[illegible] for a wide range of products, in particular tea.

The indices for metal manufacturing and the steel industries were unchanged in May; the indices for all other sectors of industry rose by between ½ and 1¼ per cent.

The change in the index for all manufactured products over the twelve months to May was 20¾ per cent, the same as in April.

Input prices

The provisional price index for materials and fuel purchased by manufacturing industry fell by ½ per cent to 348.1.

The index for coal, gas and electricity increased by 1¼ per cent, mainly as a result of further gas price rises. Following the tariff increases in April there were further price increases for tariff sales and price increases for sales under directly negotiated contracts. The index has risen by 10¼ per cent since February.

The index for *materials* purchased by manufacturing industry other than the food, drink and tobacco industries was unchanged in May, partly as a result of the continued stability in the exchange rate of sterling and partly because there were no major movements in world commodity prices. In contrast to the index for coal, gas and electricity this index has risen by just ¾ per cent in the latest three months.

Lower prices for tea and coffee beans were responsible for the 1¾ per cent fall in the index for *materials* purchased by the food manufacturing industries. There were also falls in the prices of home-grown potatoes and home-landed fish but these were offset by increased prices for imported cereals, cocoa beans, home-produced meat, and milk for manufacturing purposes.

Further price increases for liquid fuel (for furnaces), gas, electricity and petroleum products were responsible for the increase of 2¼ per cent in the index for fuel purchased by the food manufacturing industries. This index rose by 10 per cent in the latest three months.

The higher prices for fuels were reflected in many of the indices of materials and fuel for other sectors of industry. More than half the increase of 1¾ per cent in the index for the pottery and glass industries was accounted for by the liquid fuel and gas price rises, while the main contributors to the 2 per cent increase in the index for the bricks, cement, etc industries were liquid fuel and sand and gravel. The index for the steel industries increased by ½ per cent with a further fall in the price of heavy steel scrap (making an overall fall of 17 per cent in the last 6 months) partially offsetting the price increases for liquid fuel and gas. The indices for these three sectors of industry have increased by about 6 per cent in the latest three months.

The fall of ¼ per cent in the textile industries index was due to further lower prices for cotton and wool, which were partially offset by higher prices for fuels and a number of materials.

A fall in copper prices was offset by higher tin and lead prices in the non-ferrous metals index, and restricted the increase in the index for electrical engineering industries to ¼ per cent.

Further information

Correspondence about wholesale price index numbers should be addressed to Statistics Division 4, Room 249, Sanctuary Buildings, Great Smith Street, London SW1P 3DB. Telephone inquiries for price index numbers should be made to 01-215 3544 (tables 1 and 2 indices), 3549 (engineering), 5216 (chemicals, steel, building materials, etc.), 3548 (textiles, clothing, timber, paper, etc), 3173 (imported commodities).

Notes on wholesale price indices

1 Detailed notes on index numbers of wholesale prices were last shown in *Trade and Industry* of 13 May 1977.

2 The index numbers are constructed on a net sector basis. This is to say, the price movements used to compile the index for a particular sector of industry are only those relating to transactions between the sector and other sectors. Transactions between undertakings in the same sector are excluded. Thus index numbers for the whole of manufacturing industry are not weighted averages of sector index numbers.

3 All the index numbers are compiled exclusive of value added tax and (before its abolition) of purchase tax. Revenue duties (on cigarettes and manufactured tobacco, alcoholic liquor, matches and mechanical lighters) are included. The duty on hydrocarbon oils is excluded from output price series that cover these products (unless specifically noted to the contrary) but is included in series for materials and fuel purchased by sectors of industry.

4 Firm and provisional indices, at all levels of aggregation, include imputation for items for which there is no current price information. Additional provisional figures will be published for those indices where there are insufficient returns to allow accurate imputation.

5 Revisions to firm index numbers will only be made if they are significant. These revisions will be notified when the series are next published.

TABLE 1 Price index numbers of materials purchased

1970 = 100

1968 SIC		1976				1977	1976				1977				
		1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	May	Oct	Nov	Dec	Jan	Feb	Mar	Apr p	May p
Orders III to XIX	Materials and fuel purchased by manufacturing industry:	266.5	292.6	306.8	329.9	341.5	292.0	327.7	331.8	330.2	337.8	339.5	347.2	349.8	348.1
	Materials†	272.5	299.2	314.6	339.7	351.6	298.5	337.6	341.8	339.8	347.9	349.7	357.3	358.8	356.6
	Coal (except for carbonising), gas and electricity	210.1	230.6	232.0	236.3	244.8	230.6	233.3	236.6	238.9	241.0	242.6	250.7	264.3	267.6
Orders IV to XIX	Materials and fuel purchased by manufacturing industry, other than food, drink and tobacco manufacturing industries	280.3	313.5	328.3	348.4	355.8	313.1	348.3	350.5	346.3	353.4	354.7	359.4	359.9	360.1
	Materials†	290.3	325.3	342.0	364.3	371.6	324.8	364.6	366.7	361.5	369.4	370.6	374.9	373.5	373.2
Order III	Materials and fuel purchased by the food, drink and tobacco manufacturing industries	235.4	246.8	257.3	283.1	303.0	246.0	274.4	285.2	289.6	297.4	299.9	311.6	321.8	319.7
	Materials and fuels purchased by selected broad sectors of industry:														
211 to 229	Food manufacturing industries	237.0	246.5	258.2	288.7	309.4	245.4	281.4	290.3	294.4	302.3	305.6	320.2	327.6	322.3
	Materials	237.3	246.5	258.3	289.5	310.3	245.3	282.3	291.0	295.1	303.1	306.5	321.4	328.5	322.7
	Fuel*	230.9	248.0	254.0	268.0	283.7	248.6	256.7	271.8	275.4	281.3	282.2	287.7	303.8	310.7
211 to 229 (excluding MLH 219)	Food manufacturing industries (excluding animal and poultry foods)	235.8	243.3	254.3	284.9	307.1	242.1	277.3	286.8	290.6	299.1	302.8	319.4	326.1	320.0
Order V	Chemicals and allied industries	258.7	276.5	289.8	310.3	319.3	276.3	306.4	312.5	312.0	316.6	317.8	323.6	329.5	332.5
311 and 312	Steel industries	247.0	281.6	291.3	299.5	303.3 p	282.3	297.5	301.0	299.9	301.5	303.3	305.2 p	318.8	320.7
321 to 323	Non-ferrous metals industry	157.3	189.3	202.0	205.4	222.3	189.7	203.6	207.5	205.1	215.5	222.2	229.3	222.3	222.1
Order VII (excluding MLH 342)	Mechanical engineering industries	226.6	245.1	260.6	274.9	283.7	245.3	271.9	275.5	277.3	281.8	283.6	285.7	288.0	289.6
Order IX	Electrical engineering industries	196.4	218.5	231.4	238.1	249.2	218.5	236.2	238.8	239.4	245.1	249.3	253.3 p	253.1	253.7
Order X	Shipbuilding and marine engineering industries	222.3	238.5	253.0	266.2	275.9	239.0	263.3	266.7	268.6	273.6	276.0	278.2	280.2	282.2
Order XII	Metal goods industries	234.4	258.3	272.3	291.4	298.2	258.1	287.7	293.3	293.3	294.2	297.6	302.8	303.3	304.6
Order XIII	Textile industries	232.4	255.9	275.1	298.8	298.6	255.0	296.9	301.2	298.2	298.6	299.3	297.8	298.8	298.2
Order XV	Clothing and footwear industries	197.4	209.1	219.1	231.0	240.9	209.1	228.1	232.0	232.8	239.0	241.3	242.5	246.0	247.9
461, 464 and 469	Bricks, cement, etc, industries	245.1	259.0	271.1	282.4	298.3	258.9	276.6	283.5	287.2	294.1	297.3	303.5	308.7	314.6
462 and 463	Pottery and glass industries	237.8	248.5	259.6	274.6	289.4	248.7	267.1	276.4	280.2	285.9	288.6	293.7	301.4	306.4
Order XVII	Timber industries	235.2	259.7	285.9	307.0	319.9	259.7	300.5	308.4	312.2	317.6	319.7	322.3	325.4	327.8
481 to 484	Paper industries	253.5	273.7	286.0	304.7	312.5	275.0	302.6	306.5	304.9	310.9	312.1	314.6	316.8	318.2
Order XX	Construction materials	227.2	242.5	258.2	271.5	284.0	243.4	267.8	272.1	274.5	279.5	284.8	287.7	290.5	293.8
Part of Order XX	House building materials	229.2	244.7	261.6	276.3	288.6	245.9	272.6	277.0	279.2	283.5	289.6	292.6	295.6	299.6

† Includes crude oil and coal for carbonising.

* Includes petroleum products.

TABLE 1(a) Price index numbers of materials and fuel purchased by selected sectors of industry

1970 = 100

1968 SIC		1976				1977	1976				1977				
		1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	May	Oct	Nov	Dec	Jan	Feb	Mar	Apr p	May p
361	Electrical machinery industry	211.5	230.9	245.2	256.2	264.2	230.7	253.9	256.7	258.0	261.9	264.1	266.7	267.9	269.4
362	Insulated wires and cables industry	152.1	179.3	191.4	187.0	198.6	179.2	187.3	187.6	186.0	193.5	198.4	203.9	200.9	199.0
364	Radio and electronic components industry	209.7	224.6	237.1	248.4	259.5	224.9	245.2	249.2	250.7	255.9	259.4	263.2	265.6	267.4
368	Domestic appliances industry	205.3	222.3	234.4	246.3	255.0	222.0	243.4	246.9	248.5	253.4	254.4	257.2	259.0	261.0
369	Electrical goods industries n.e.s.	200.7	219.6	231.6	240.9	254.2	219.8	238.7	241.3	242.6	249.1	254.3	259.2	259.1	261.0
381	Motor vehicle industry	229.6	247.4	261.7	276.3	285.2	247.5	273.3	277.0	278.5	282.9	285.4	287.3	289.7	291.3
411	Man-made fibres industry	231.1	248.1	259.0	275.8	277.8	247.5	273.7	277.1	276.5	276.3	277.5	279.6	282.9	285.7
414	Woollen and worsted industry	255.2	282.9	302.2	338.4	333.3	282.7	337.9	340.6	336.7	340.4	336.2	323.2	318.4	315.4
422/1	Household textiles and handkerchiefs industry	210.1	224.2	243.3	257.5	269.3	223.8	254.3	258.1	260.0	265.4	268.6	274.0	276.4	278.9
450	Footwear industry	198.3	214.7	222.9	231.6	239.3	213.9	229.7	232.2	232.8	236.2	240.2	241.6	244.4	246.5
481	Paper and board making industry	262.8	288.5	299.3	318.4	318.1	290.8	317.1	320.2	317.8	314.9	318.0	321.5	324.1	325.4

TABLE 2 Price index numbers of output (home sales)

1970 = 100

1968 SIC		1976				1977	1976				1977				
		1st qtr	2nd qtr	3rd qtr	4th qtr	1st qtr	May	Oct	Nov	Dec	Jan	Feb	Mar	Apr p	May p
Orders III to XIX	Output of manufactured products	206.9	214.4	223.2	233.9	248.0	214.8	230.0	234.6	237.2	244.9	248.2	250.8	255.4	259.6
Orders IV to XIX	Products of manufacturing industry other than food, drink and tobacco manufacturing industries	214.5	222.0	230.8	241.2	254.5	222.4	237.0	242.0	244.5	251.0	254.9	257.6	261.0	265.1
211 to 229	Output of selected broad sectors of industry Food manufacturing industries	215.2	222.2	233.8	252.2	267.3	222.4	248.4	252.5	255.8	263.9	267.1	270.9	276.4	282.7
211 to 229 (excluding MLH 219)	Food manufacturing industries (excluding animal and poultry foods)	215.5	220.5	230.2	247.3	262.5	220.5	244.1	247.5	250.4	259.3	262.2	266.1	272.0	279.2
Order V	Chemicals and allied industries	206.5	213.7	221.0	228.8	239.7	213.8	226.1	228.8	231.5	237.8	239.5	241.7	245.8	249.0
Order VI	Metal manufacturing	217.7	240.6	259.1	271.8	283.8	240.5	269.9	272.4	273.2	280.5 r	283.8 r	287.2	286.9	286.7
311 and 312	Steel industries	237.3	260.3	281.8	300.2	311.0	259.3	298.1	301.2	301.4	309.5 r	310.8 r	312.7	313.0	312.9
Orders VII to XII	Engineering and allied industries	209.9	217.7	226.6	236.3	248.1	218.3	232.8	237.0	239.0	244.1	248.4	251.7	254.6	259.7
Order VII (excluding MLH 342)	Mechanical engineering	218.6	226.1	235.4	244.5	255.7	226.5	241.8	244.7	247.0	252.6	255.5	259.0	262.2	264.6
Order VIII	Instrument engineering	184.9	190.9	196.7	203.7	211.6	190.8	201.0	203.5	206.7	210.1	211.7	213.1	215.7	219.4
Order IX	Electrical engineering	191.5	199.1	205.8	214.1	223.1 p	198.9	212.6	214.4	215.4	220.1	222.7	226.4 p	229.9	233.2
Order XI (excluding MLH 383)	Vehicles	227.7	236.8	247.6	260.0	277.1	238.3	253.0	262.1	265.0	268.9	279.9	282.6	285.1	298.0
Order XII	Metal goods industries n.e.s.	215.7	227.1	238.3	253.6	263.5	227.4	249.6	255.0	256.1	261.2	263.6	265.8	268.9	270.4
Order XIII	Textile industries	193.0	201.1	209.6	219.9	234.9	201.5	217.2	220.2	222.4	232.4	235.2	237.1	239.7	241.2
Order XV	Clothing and footwear	176.6	180.3	186.4	193.7	202.4	180.4	192.2	194.2	194.8	201.5	202.3	203.4	204.9	205.9
441 to 445 and 449	Made-up clothing	172.6	175.9	180.2	188.5	195.5	176.2	187.1	188.8	189.6	195.1	195.5	196.0	197.1	197.9
461, 464 and 469	Bricks, cement, etc, industries	231.5	243.1	254.3	265.6	279.8	245.2	261.2	265.7	270.0	273.4	280.6	285.5	288.4	293.0
462 and 463	Pottery and glass industries	215.4	223.2	230.2	241.5	251.4	223.4	239.7	241.8	243.0	247.2	251.2	255.9	263.5	266.4
Order XVII	Timber industries	218.7	225.5	235.7	248.5	266.6	225.6	244.0	247.8	253.6	261.7	266.9	271.1	273.4	275.7
481 to 484	Paper industries	235.4	242.4	254.6	266.0	278.5	243.1	262.2	265.7	270.1	277.7	278.5	279.4	281.9	285.1
Order XX	New construction‡	238	246	264			246								

‡ Index of building costs relate to average for the quarter (*Department of Environment*). r = revision

A Century of Trade Marks 1876-1976

Prepared by Mr R. L. Moorby, Assistant Registrar, with assistance from Mr D. Myall and Mr F. J. Ward Dyer, this interesting and informative book is the first to explain in layman's terms the complex subject of Trade Mark Law and is a fitting tribute to the work of the Trade Marks Registry over the last 100 years. Opening with a brief outline of trade mark history prior to 1875, the book shows how the growing commercial pressure for statutory protection of a distinctive trade mark led to the 1875 Act and the establishment of the Registry, under its far sighted Registrar, Sir Reader Lack, to administer the law. Distinctive and deceptive trade marks are illustrated and quoted as examples of the essential criteria for acceptance laid down from the beginning. There are interesting records of some of the personalities involved at the outset, and the last three chapters deal with the Manchester Branch and the Cutler's Company, 'Trade Marks as Footnotes to Social History' and a look at the future in the light of the Mathys Committee and our membership of the EEC.

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HMSO BOOKS

TABLE 3(a) Commodities produced in the United Kingdom (as published monthly)

1970=100

1968 SIC		1976	1977			
		May	Feb	Mar	Apr p	May p
Mining and quarrying						
101	Coal	350.2	356.3	400.9	402.7	402.7
102	Stone and slate quarrying and mining	263.3	299.1	301.0	301.7	312.5
102/1	Granite and limestone roadstone	251.9	278.4	281.8	282.5	293.4
	Coated limestone roadstone	307.7	358.2	361.1	364.9	378.3
	Granite and other chippings	234.2	254.2	255.4	255.1	263.2
103	Chalk, clay, sand and gravel extraction					
	Sand and gravel – ex pit or works	227.6	275.9	276.4	276.4	301.6
	Sand and gravel – delivered	194.1	228.0	229.3	229.3	244.3
Food, drink and tobacco						
240	Tobacco	162.9	190.6	190.6	205.9	207.6
Coal and petroleum products						
261	Coke ovens and manufactured fuel					
	Foundry coke	404.2	404.2	468.7	468.7	468.7
262	Mineral oil refining					
	Petroleum products	378.9	475.5	475.5	478.5	497.4
	Motor spirit two star (including duty)ø	208.2	221.4	222.4	238.6	243.3
	Medium fuel oil (950-secs inging duty)ø	346.4	462.9	464.2	489.5	505.4
	Derv fuel (including duty)ø	192.8	217.0	218.0	234.5	240.6
263	Lubricating oils and greases	238.1	276.1	281.6	281.2	281.3
Chemicals and allied industries						
271	General chemicals	240.6	271.0	275.0	278.6	282.7
271/1	Inorganic chemicals (including inorganic gases)	236.1	261.6	269.1	272.4	273.9
271/2	Organic chemicals (including organic gases)	262.5	298.2	298.7	304.0	310.0
272	Pharmaceutical chemicals and preparations					
	Pharmaceutical chemicals	214.0 r	242.5	248.4	256.2	260.8
	Pharmaceutical preparations	187.3	209.7	210.6	215.7	217.7
273	Toilet preparations	186.9	210.7	212.2	214.5	215.9
274	Paint	221.9	248.9 r	250.7	251.1	259.5
276	Synthetic resins and plastics materials and synthetic rubber					
276/1	Synthetic resins and plastics materials	203.9	234.2	236.8 p	241.8	243.7
	Polyolefin moulding materials	214.3	245.7	247.3 p	247.5	249.7
	Polyvinyl chlorides	224.7	263.6	266.6	277.9	281.1
279	Other chemical industries					
279/3	Explosives, fireworks etc	247.2	275.3	277.9	279.1	279.1
Metal manufacture						
311/2	Steel					
	Steel sheets	236.5	286.8	286.3	286.4	286.5
	Electrical steel sheets	236.7	296.9	296.9	296.9	297.0
	Stainless steel sheets	166.1	235.4	235.4	235.4	235.4
	Uncoated steel sheets (other than stainless and electrical)	248.7	296.0	295.2	295.4	295.5
	Galvanised steel sheets	242.8	289.9	289.9	290.0	290.2
	Tinplate	241.7	290.8	303.4	303.4	305.1
	Semi-finished steels	281.5	348.6	348.6	348.8	349.1
	Semi-finished steels for forgings (other than drop forgings)	279.4	363.3	363.3	363.6	364.0
	Semi-finished steels for alloy stainless products (except sheets and tubes)	244.8	303.1	303.1	303.4	303.8
	Semi-finished steels for drop-forgings and stampings	286.8	352.2	352.2	352.5	353.0
	Semi-finished steels for tubes	291.1	359.8	359.8	360.0	360.1
	Semi-finished steel for forgings (other than drop forgings) (using Public Sector indicators)	284.9	360.1	360.1	360.6	361.2
	Finished steels (other than sheets, tinplate, tubes, forgings and castings)	261.0	314.8	315.2	315.5	314.4
	Steel wire rods	257.3	319.7	319.7	319.8	319.9
	Heavy steel rails and fishplates	284.4	347.7	347.7	347.7	347.7
	Steel plates (alloy)	276.4 r	284.8	284.8	307.8	326.3
	Steel plates (non-alloy)	262.8	303.5	303.5	303.7	303.8
	Steel sheet piling	269.0	331.4	331.4	336.0	341.2
	Heavy steel bars and sections	266.7	332.4	332.4	332.9	333.4
	Light re-rolled bars and sections	264.2	333.6	333.6	333.9	323.3
	Hot rolled steel strip	289.3	356.9	356.9	357.0	357.1
	Bright steel bars (non-alloy)	264.0	315.7	315.7	315.7	315.7
	Cold rolled steel strip (non-alloy)	260.4	287.8	287.8	287.8	287.8
	Alloy steel bars and rods, black (excluding stainless)	231.2	279.1	279.1	279.2	279.2
	Finished stainless steels	203.3	256.1	256.1	256.1	256.2
	High speed tool and magnet steel	238.3	277.5	291.4	291.4	291.5
	Steel castings	238.6	279.5	285.5	285.5	290.6
	Carbon steel castings	237.5	283.8	293.5	293.5	295.8
	Stainless and heat resisting alloy steel castings	209.2	239.0	240.9	240.9	252.3
	Other alloy steel castings	267.8	306.9	308.7	308.7	314.3
	Structural steel	266.3	321.5	321.5	321.8	322.1
	Forgings (other than drop forgings)	335.2	388.7	389.8	391.8	392.1
312	Steel tubes					
	Steel tubes and fittings	283.5	336.8 r	337.5	337.5	337.8
	Steel tubes (other than electric conduit tubes)	285.4	340.2 r	340.8	340.8	340.8
	Non-alloy steel tubes, hot finished	301.0	363.1 r	363.1	363.1	363.1
	Pipe fittings	253.5	279.7	279.7	279.7	285.1
313	Iron castings, etc.	276.0	306.8	309.5	313.9	316.8
313/3 and 313/4	Iron castings	269.4	298.3	301.5	306.3	309.4
313/4	Other iron castings					
	Cast and spun iron pipes and fittings	286.0	312.5	323.0	330.6	330.6
321	Aluminium and aluminium alloys					
	Wrought aluminium	204.7 r	267.7	271.6	274.1	274.3
	Aluminium: Rolled	181.1 r	271.7	273.1	278.0	278.0
	Extruded and drawn aluminium products – other than wire	202.8 r	275.2	280.1	276.0	276.0
	Aluminium: Castings	236.1	268.5	272.3	278.8	279.4
	Aluminium: Forgings	190.6	231.0	242.6	242.6	242.6
322	Copper, brass and other copper alloys					
	Copper tubes	149.3	170.8	174.9	175.1	167.2
	Brass ingots	172.4	170.3	177.0	171.5	170.8

TABLE 3(a) *(continued)*

1968 SIC		1976	1977			
		May	Feb	Mar	Apr p	May p
	Mechanical engineering					
331	Agricultural machinery	226.6	276.2	277.6	281.8	284.3
	Soil preparation and cultivating machinery	233.7	273.3	275.0	282.1	283.2 e
	Harvesting, threshing, feed-processing machinery, etc.	232.2	286.5	288.3	289.9	292.0 e
	Pick-up balers	237.4	287.7	289.7	290.8	290.8 e
	Hay and silage making machinery	187.5	225.5	225.5	233.7	238.5 e
	Grinding mills and meal mixers	226.0	265.5	272.2	277.8	28[illegible]2 e
	Milking machines	208.4	264.2	264.2	272.7	272.7 e
	Other agricultural machinery (spraying machinery, general purpose elevators and conveyors etc.)	214.8	253.5	254.3	262.6	272.2 e
332	Metal-working machine tools	244.2	277.5 p	280.2 p	284.0	287.9 e
332/1	Metal-cutting machine tools	246.8	281.9 p	283.2 p	287.3	290.9 e
332/2	Metal-forming machine tools	236.3	268.6	272.2	278.4	283.5 e
333	Pumps, valves, compressors, fluid power equipment	225.0	243.6 p	248.5 p	252.1	253.7
333/1	Pumps	210.4	232.0 p	232.2 p	237.4	237.4
	Kerbside petrol and oil measuring pumps	205.2	221.2	222.2	223.7	223.7 e
	Industrial pumps	210.8	232.6 p	232.8 p	238.2	238.3 e
	Centrifugal, turbine and axial flow pumps	212.6	240.0 p	240.1 p	243.9	244.0 e
333/2	Industrial valves	257.4	267.6	269.9 p	273.0	277.1 e
	Iron valves	253.5	276.7	279.8	280.8	287.7 e
	Steel valves	277.3	273.2	273.8 p	279.5	282.9 e
	Non-ferrous valves	235.2	252.2	256.0	257.7	260.3 e
333/3	Air and gas compressors	224.5	248.3	271.8	273.5	273.5 e
333/4	Fluid power equipment					
	Oil/hydraulic fluid power equipment	205.4	231.7 p	232.7 p	236.7	237.4 e
	Pneumatic fluid power and control equipment	175.8	196.0	205.1	207.9	207.9 e
334	Stationary internal combustion engines and steam turbines	225.4	255.4	260.0	265.0	268.5
336	Construction and earth-moving equipment	227.5	261.6	274.4	278.5	282.7
	Contractors' plant and parts	226.5	261.1	274.1	278.0	282.4 e
	Excavators, trenchers, diggers, etc.	246.1	286.0	306.0	313.9	313.9 e
	Concrete mixers	228.6	244.3	259.6	264.4	264.4 e
	Dumpers	227.0	250.3	262.0	262.5	265.6 e
	Crawler tractors	198.2	244.0	250.1	251.9	253.2 e
	Crushing and screening plant and parts	232.8	259.7	269.7	276.4	276.4 e
337	Mechanical handling equipment	218.6	245.8 p	250.6 p	254.7	256.5
337/2	Cranes	213.2	250.2	251.1	252.1	252.1
337/4	Lifting and winding devices	223.6	256.0	256.6 p	259.1	260.3
337/5	Powered industrial trucks and tractors	226.8	261.7 p	266.1 p	272.9	276.0
339/1	Mining machinery	197.0	223.9	224.1	228.6	228.6 e
339/3	Commercial and industrial refrigeration machinery	219.8	251.7 p	266.9 p	268.9	270.9
339/5	Scales and weighing machinery	239.3	263.8	264.8	264.8	273.6 e
339/6	Portable power tools	201.9	230.8	237.1	233.7	234.1 e
339/7	Food and drink processing machinery	214.9	247.9 p	248.4 p	258.0	258.8
339/8	Bottle washing, bottling, packaging, labelling and canning machinery	216.9	244.3	245.4	254.6	255.5
339/9	Miscellaneous machinery	217.1	250.9	253.3	256.5	257.6 e
	Instrument engineering					
352	Clocks, watches and time recorders	206.3	236.8	236.8	237.1	239.5
354	Scientific and industrial instruments and systems	192.2	212.2	214.0	216.1	219.5 e
354/1	Optical instruments					
	Microscopes	193.4	194.9	216.2	216.2	216.2 e
354/2	Other scientific and industrial instruments					
	Process measuring and control instruments	197.7	221.4	223.6	223.7	227.7 e
	Analytical instruments	178.6	197.5	198.0	198.8	201.5 e
	Spectrophotometers and absorptiometers	150.5	163.3	164.6	164.6	167.2 e
	Electrical testing, measuring and control instruments	188.2	202.3	202.7	208.4	212.3 e
	Electrical engineering					
365	Broadcast receiving and sound reproduction equipment	145.6	159.0 p	159.2 p	164.0	166.0 e
365/1	Gramophone records and pre-corded tapes	177.0	197.0	197.0	197.0	197.0 e
	Gramophone records	182.6	203.5	203.5	203.5	203.5 e
	Pre-recorded tapes – cassettes	180.6	199.7	199.7	199.7	199.7 e
	Pre-recorded tapes – cartridges	153.6	170.1	170.1	170.1	170.1 e
365/2	Other broadcast receiving and sound reproduction equipment	142.1	154.8 p	155.0 p	160.4	162.6 e
	Domestic television receivers†	142.7	156.8 p	156.8 p	163.5	166.2 e
	Domestic television receivers – colour†	131.7	141.6 p	141.6 p	142.9	144.2 e
	Domestic television receivers – monochrome†	145.9	161.2 p	161.2 p	169.5	172.5 e
	Record players and tape recorders	140.2	148.5 p	148.5 p	149.8	151.3 e
368	Domestic electrical appliances	178.3	202.0	208.7	214.3	215.6
	Domestic electrical cooking appliances	185.3	210.1	217.4	221.6	222.8 e
	Electric cookers	183.3	208.1	216.5	222.4	223.3 e
	Domestic electrical heating appliances	192.6	215.9	217.9	226.9	229.8 e
	Electric fires	181.1	218.7	218.7	230.7	237.4 e
	Electric water heaters, wash boilers, etc.	241.9	264.6	273.7	278.3	278.3 e
	Electric vacuum cleaners and polishers	180.8	211.6	227.3	227.3	227.3 e
	Domestic electric flat irons	208.2	231.7	244.3	245.2	247.0 e
	Domestic refrigerators, gas and electric	172.0	195.5	197.7	204.6	206.8 e
	Domestic electric refrigerators	174.0	202.4	205.4	215.1	218.3 e
369/2 and 369/3	Batteries and accumulators	207.4	253.9	262.1	276.4	279.9 e
369/4	Electric lamps and fluorescent tubes	188.4	214.2	218.1	218.1	227.2 e

TABLE 3(a) Commodities produced in the United Kingdom *(continued)*

1968 SIC		1976	1977			
		May	Feb	Mar	Apr p	May p
Vehicles						
380	Wheeled tractors	281.5	339.7	342.1	346.1	362.8
381	Motor vehicles					
	Passenger cars	231.7	272.1	274.4	276.2	291.5 e
	Passenger cars‡	211.2	248.1	250.2	251.8	265.8 e
	Commercial and public service vehicles	252.0	297.8	300.3	302.5	317.9 e
	Commercial vehicles	255.3	300.8	303.1	305.3	321.3 e
	Commercial vehicles and chassis not exceeding 3.5 tons Gross Vehicle Weight	253.8	299.6	302.3	304.2	322.0 e
	Commercial vehicles and chassis exceeding 3.5 tons but not exceeding 16 tons Gross Vehicle Weight	265.3	310.4	312.1	314.5	328.4 e
	Commercial vehicles and chassis exceeding 16 tons Gross Vehicle Weight	235.0	278.9	278.9	284.0	290.1 e
	Commercial vehicles not exceeding 1½ tons Gross Vehicle Weight	255.6	300.1	303.2	305.0	324.2 e
	Commercial vehicles and chassis over 1½ tons Gross Vehicle Weight	251.7	297.4	298.7	302.6	315.2 e
	Public service vehicles	250.2	289.9	295.0	298.0	307.5 e
Metal goods not elsewhere specified						
390	Engineers' small tools and gauges					
	Engineers' cutting tools	194.2	227.5	229.9	237.3	246.5
	Engineers' cutting tools: diamond	165.6	191.6	191.6	191.6	201.9
	Engineers' cutting tools and parts: non-diamond	196.4	229.9	231.6	239.7	249.4
	Hacksaw blades	194.3	234.4	250.2	255.4	255.4
391	Hand tools and implements	236.7	276.9	283.1	292.2	296.1
392	Cutlery and tableware, etc.	217.6	248.1	252.5	256.9	257.0
393	Nuts and bolts, etc.	267.1	327.4	330.1	330.1	331.6
	High tensile steel nuts and bolts	283.1	345.7	348.4	348.4	350.0
399	Metal industries not elsewhere specified					
399/1	Metal furniture, office and works equipment	200.5	232.6	234.1	234.7	236.2
	Metal non-domestic furniture	209.0	241.9	244.0	244.9	245.1
	Metal chairs	185.2	202.9	207.1	211.2	213.3
	Metal cabinets	207.8	235.5	235.5	235.5	235.5
399/2	Metal windows and door frames					
	Metal windows and curtain walling	327.9	398.4	400.4	403.0	405.1
399/9	Domestic gas appliances	178.8	210.1	210.5	212.3	213.1
	Gas cookers	178.4	211.1	211.1	211.1	211.6
	Gas water heaters and wash boilers	189.7	230.6	233.5	238.8	238.8
	Gas fires and space heaters	174.9	199.6	200.1	203.8	205.4
	Gas water heaters and gas fires	178.9	208.2	209.3	213.5	214.6
399/12	Miscellaneous metal goods					
	Catering equipment	206.6	234.5	235.1	241.9	242.0
	Plumbers' brassware	189.6	211.6	214.3	215.4	215.4
	Domestic oil burning appliances	224.6	259.8	259.8	265.1	274.3
Textiles						
411	Man-made fibres production	174.0	192.4	193.4	196.2	196.8
412	Spinning and doubling on the cotton and flax systems	210.6	243.7	246.1	247.8	249.5
	Cotton yarns, cotton-spun man-made fibres, yarns and mixtures of both	236.6	276.9	279.8	282.4	284.3
413	Weaving of cotton, linen and man-made fibres	215.3	249.4	252.1	255.6	257.4
	Woven cotton cloth in the loomstate	219.2	264.3	267.2	269.5	271.3
	Man-made fibres fabrics in the loomstate	209.6	231.4	232.0	236.6	237.9
414	Woollen and worsted	232.4	280.9	282.0	282.6	287.6
414/2	Worsted spinning	219.8	264.9	267.7	265.6	277.4
	Yarns of wool spun on the worsted system	229.0	283.0	286.6	285.6	300.7
	Yarns of man-made fibres spun on the worsted system	185.6	203.8	205.7	201.7	206.4
417	Hosiery and other knitted goods	166.2	192.5	193.9	196.2	196.6
419	Carpets and rugs	208.2	239.2	241.5	243.7	244.3
	Carpets	208.1	238.7	240.9	243.2	243.8 e
	Carpets – woven	228.2	264.0	265.7	268.8	269.8 e
	Tufted carpets	168.5	188.8	192.0	192.7	192.6 e
429	Other textile industries					
429/1	Asbestos manufactures	197.4	233.4	241.9	242.1	244.9
Leather, leather goods and fur						
431/1	Leather for footwear	200.8	215.7	215.7	218.2	219.9
Clothing and footwear						
450	Footwear – including rubber footwear	189.9	220.9	222.8	224.3	225.7
Bricks, pottery, glass, cement etc						
461	Bricks, fireclay and refractory goods	247.0	284.4	295.0	298.2	305.5
461/1	Refractory goods including bricks	250.1	294.2	309.1	313.7	315.1
461/2	Non-refractory goods including building bricks	245.6	279.9	288.4	290.9	301.0
	Building bricks – delivered	225.7	296.5	296.8	300.1	311.8
	Engineering bricks – delivered	280.2	314.5	319.3	320.7	324.6
463	Glass	225.4	254.5	260.5	269.1	272.2
463/1	Glass other than containers	222.1	252.9	254.4	258.9	264.1
	Flat glass (including safety and silvered glass)	220.9	247.3	248.4	255.7	257.6
	Glazing sheet and plate glass	197.8	232.8	232.8	244.7	246.1
463/2	Glass containers	230.3	256.8	269.5	284.2	284.2
464	Cement	249.9	279.9	280.6	280.6	280.6
	Cement – delivered in bulk	249.9	279.8	280.6	280.6	280.6
	Cement – delivered in bags	249.9	280.1	280.7	280.7	280.7
469/2	Building materials not elsewhere specified	246.3 r	282.3	285.6	287.9	291.9
	Precast concrete products	231.7	268.0	271.1	272.0	276.4
	Precast concrete pipes – delivered	265.3	319.4	319.6	322.1	334.4
	Precast concrete manholes – delivered	215.7	248.2	248.6	250.7	256.6
	Plaster gypsum	227.1	243.9	243.9	258.0	265.0
	Mastic asphalt	208.8	266.2	266.2	280.9	283.5
Timber, furniture etc						
471/1	Timber sawmilling					
	Homegrown hardwood – sawn	237.4	279.0	280.3	285.3	289.0
471/2	Building joinery	255.9	315.2	319.8	322.7	323.0
	Timber structures and structural components	255.6	318.4	319.4	320.6	320.9
	Door sets, doors and door frames (excluding hardwood doors architecturally designed)	245.4	325.1	328.0	330.9	331.5
	Windows and window frames (wood)	282.6	326.8	343.1	353.2	353.2
	Other building joinery (ie architectural and general joinery)	255.2	330.7	333.3	333.3	333.3

TABLE (3a) *(continued)*

1968 SIC		1976	1977			
		May	Feb	Mar	Apr p	May p
472	Furniture and upholstery	205.3	236.9	240.8	243.7	245.8
	Domestic furniture	204.0	232.8	235.8	239.0	241.4 e
	Bedroom furniture	187.8	210.0	213.9	215.3	216.8 e
	Bookcases, bookshelves, bureaux, occasional furniture	205.3	239.3	242.4	244.0	244.4
	Dining room furniture	210.8	244.2	245.4	246.9	247.3
	Kitchen furniture	224.7	264.7	271.1	280.5	287.7 e
	Upholstered furniture	193.9	218.7	219.2	220.1	220.8 e
473	Bedding etc.	225.0	270.9	272.7	272.7	274.8
	Upholstered spring interior mattresses	231.0	278.5	278.5	278.5	280.8 e
	Divan sets	250.0	290.4	292.8	292.8	295.8
Paper, printing and publishing						
481	Paper and board	239.0	284.3	284.4	288.1	290.1
	Printings and writings – excluding newsprint	235.3	285.8	285.8	285.8	286.9
482	Packaging products of paper, board and associated materials					
482/1	Cardboard boxes, cartons and packing cases – fibreboard	243.9	272.9	274.7	276.7	281.6
482/2	Packaging products of paper and associated materials					
483	Manufactured stationery	241.8	288.8	289.7	290.7	292.4
484	Manufactures of paper and board not elsewhere specified					
484/1	Wallpaper	225.1	239.1	240.9	244.3	244.3
489	Other printing, publishing, bookbinding, etc.					
	General printing, bookbinding, etc.	206.5	225.7	227.0	227.2	231.2

1968 SIC		1976	1977			
		May	Feb	Mar	Apr p	May p
Other manufacturing industries						
491	Rubber manufactures					
491/1	Rubber tyres and tubes	192.2	232.2	236.1	243.1	243.4
492	Linoleum, plastics, floor covering and leathercloth					
	Linoleum and felt base	209.5	226.3	226.3	226.3	226.3
102/1 and 103 312	Part Aggregates for concrete	214.3	230.3	232.7	233.4	248.6
361/2 362 369/5	Part Electrical installation materials, domestic	202.5	234.9	236.9	239.3	240.6 e
338 399/1 399/3 472	Part Office equipment and machinery	187.2	211.2	214.8	217.9	218.5
399/1 472	Part Office furniture	229.4	263.4	269.4	269.9	270.1
412 414	Part All spun man-made fibres yarns	198.1	218.1	219.7	222.1	224.5

ø Index based on scheduled outer zone prices for minimum bulk loads of 500 gallons (motor spirit 1000 gallons) exclusive of rebates.
p Provisional
e Estimates which are subject to possible major revisions.
† Excludes sales to rental companies.
‡ Inclusive of purchase tax (before its abolition), VAT and Car Tax.
r Revised.

Addendum

Confirmation of figures previously published as provisional

		1977
		Jan
333/2	Industrial valves	267.1
	Non-ferrous valves	252.0
352	Clocks, watches and time recorders	231.6

TABLE 3(b) Commodities wholly or mainly imported into the United Kingdom (as published monthly) 1970 = 100

	1976	1977			
	May	Feb	Mar	Apr p	May p
Hides and skins	318.2	376.6	385.4	396.7	385.8
Non-ferrous metals:					
Aluminium, virgin ingot delivered	178.2	246.2	246.2	246.2	246.2
Copper‡	141.3	141.2	149.3	140.9	135.3
Lead‡	210.3	298.1	328.3	297.4	303.4
Nickel§	210.0	260.0	261.5	259.9	259.8
Tin, ingot min. 99.75%‡	269.2	390.8	400.4	361.5	374.1
Zinc‡	346.8	333.4	343.7	308.9	289.0
Zinc§	343.2	363.4	361.8	361.4	357.0
Natural rubber	256.6	282.9	283.0	273.4	269.1
Sulphur, crude cif (for acid making)	297.1	297.2	297.2	297.2	297.2
Textiles:					
Raw cotton, all types	314.1	403.5	404.4	400.4	387.7
American types, cif Liverpool	321.6	406.8	416.3	413.0	398.2
Egyptian types, cif Liverpool	276.9	387.1	345.2	337.8	335.5

	1976	1977			
	May	Feb	Mar	Apr p	May p
Raw wool – all types	288.9	357.2	354.0	350.4	338.6
Imported	285.6	349.7	343.8	339.5	331.4
Imported, merino	262.3	318.5	313.7	312.4	308.3
Imported, fine crossbred	284.0	348.4	341.8	333.7	327.8
Imported, medium and coarse crossbred	361.3	447.3	439.3	431.5	412.8
British types	307.9	399.4	411.1	412.0	379.5
Timber:					
Imported hardwood (ex-yard or wharf)	287.1	341.4	347.4	353.3	356.3 e
Imported plywood (delivered to consumers)	253.2	325.8 r	326.2	328.4	329.4 e
Imported softwood (delivered to consumers)	294.5	382.5	385.3	386.7	389.5 e
Woodpulp, imported	329.5	353.2	351.9	349.4	349.5

‡ LME settlement price. § Producer's price. p provisional. e estimates which are subject to possible major revision. r revised.

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Revisions to table 3(a)

		Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
274	Paint	1977	247.5	—	—	—	—	—	—	—	—	—	—	—
312	Steel tubes													
	Steel tubes and fittings	1976	—	—	—	—	—	—	—	312.2	313.3	313.6	322.8	323.4
		1977	333.0	—	—	—	—	—	—	—	—	—	—	—
	Steel tubes (other than electric conduit tubes)	1976	—	—	—	—	—	—	—	315.0	315.9	315.9	325.3	325.7
		1977	336.0	—	—	—	—	—	—	—	—	—	—	—
	Non-alloy steel tubes, hot finished	1976	—	—	—	—	—	—	—	335.5	336.0	336.0	343.3	343.3
		1977	357.4	—	—	—	—	—	—	—	—	—	—	—
338, 399/1, 399/3, 472	Office equipment and machinery	1977	209.5	—	—	—	—	—	—	—	—	—	—	—
399/1, 472	Office furniture	1977	262.0	—	—	—	—	—	—	—	—	—	—	—

TABLE 5 United Nations index numbers of world export prices[1]

1970 = 100

	Primary commodities						Non-ferrous metals			Primary commodities and non-ferrous metals (2)		
	Total			Agricultural non-food								
	$	£	Purchasers' currencies	$	£	Purchasers' currencies	$	£	Purchasers' currencies	$	£	Purchasers' currencies
1974 1st quarter	303	318	274	232	244	209	160	168	144	284	298	256
2nd quarter	304	304	263	229	229	198	183	183	159	288	287	249
3rd quarter	309	315	274	221	225	196	142	145	126	287	292	254
4th quarter	320	330	284	212	213	186	126	130	111	294	303	258
1975 1st quarter	312	313	261	201	202	168	124	124	101	287	287	240
2nd quarter	299	309	250	198	204	166	121	125	101	275	284	230
3rd quarter	295	333	261	196	220	173	118	133	105	271	306	240
4th quarter	301	354	271	191	224	172	116	136	104	276	324	249
1976 1st quarter	306	368	279	202	243	184	120	144	109	281	338	256
2nd quarter	310	412	289	212	282	198	135	179	126	286	381	267
3rd quarter	314	427	291	228	310	212	140	190	130	291	395	270
4th quarter	315	458	289	232	337	213	131	190	120	290	422	267
1976 1st quarter (3)	340	476	311	240	336	219	141	197	129	313	439	286
April (4)	*359*	*502*	*324*	*256*	*357*	*231*	*147*	*205*	*132*	*331*	*462*	*299*
May (4)	*356*	*497*	*321*	*252*	*352*	*228*	*145*	*202*	*131*	*328*	*458*	*296*

(1) Published by the UN in terms of US dollars. For convenience the index numbers are also shown in sterling and in terms of purchasers' currencies by converting the dollar index at prevailing exchange rates. (2) This combined index is not published as such by the UN. (3) Provisional. (4) Projections by Department of Industry.

Index of industrial production for April

The provisional estimate for the total all-industries' index of industrial production in April 1977 is 103.2 and that for manufacturing alone is 104.7 (1970=100).

Despite the flatness of the recorded estimates, it is assessed that the underlying level of industrial output rose slowly in recent months.

It is provisionally estimated that, before any adjustment to allow for the use of delivery indicators (see below), the average level of the all-industries' index in February to April 1977 was little changed from the previous three months; the corresponding index for manufacturing industries was about ½ per cent above its level in the preceding three months. The analysis by broad market sectors shows that, over the same period, the output of the consumer goods and investment goods industries rose by 1 per cent and 2 per cent respectively, while the output of the intermediate goods industries fell by 1 per cent.

On a longer term comparison, the all-industries' index in the latest three months was about 1 per cent above its level in the same period a year ago; the corresponding rise for manufacturing industries was about 2½ per cent.

The use of series for some industries which measure deliveries rather than production resulted in the all-industries' index understating the level of output in the first quarter of 1976 by about ¼ per cent, overstating it by about ¾ per cent in the second and third quarters, and understating it again by about ½ per cent in the fourth quarter of 1976 and the first quarter of 1977.

The incorporation of later information, especially for the construction industry, has resulted in a downward revision of 1 per cent to the provisional estimates for the first quarter of 1977. Certain methodological improvements to the indices for engineering industries, described in the May issue of *Economic Trends*, have also been incorporated.

The index numbers are all seasonally adjusted. The seasonal adjustment process is designed to remove annually recurring month-to-month variations due, for example, to the incidence of holidays. The adjustments, however, can in general only be derived from analysis of past experience, and may not therefore be completely appropriate when holiday patterns change sharply. The introduction of a public holiday on New Year's Day seems to have led to more shutdowns of industrial plant in the last week of December and early in January. Similarly, there is some unquantifiable evidence to suggest that some industrial establishments took holidays at the beginning of June 1976, immediately following the Spring bank holiday on May 31 – in recent years most of such holidays would have fallen in May. The seasonal adjustment process may not yet have fully reflected these changing holiday patterns.

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Index of industrial production

Seasonally adjusted

1970 = 100

	Total all industries	All industries other than construction	Mining and quarrying	Manufacturing industries												
				Total	Food, drink and tobacco					Engineering and allied industries						
					Total	Food	Drink and tobacco	Coal and petroleum products	Chemicals and allied industries	Total	Mechanical engineering	Instrument engineering	Electrical engineering	Shipbuilding and marine engineering	Total vehicles	Metal goods n.e.s.
Weights	1,000	850	37	745	84	52	32	7	58	319	100	15	67	16	73	48
1971	100.3	109.9	100.0	99.5	100.6	99.9	101.9	103.3	102.1	98.9	98.0	103.3	101.7	98.7	100.2	93.3
1972	102.5	102.1	84.1	102.1	104.9	104.0	106.5	102.5	108.1	99.3	94.1	102.0	106.6	89.5	104.0	95.4
1973	110.0	110.6	92.6	110.7	109.3	106.3	114.2	110.0	120.9	108.7	102.3	110.2	121.3	90.6	107.6	102.9
1974	106.7	108.6	78.8	109.1	109.9	104.5	118.8	106.0	127.8	108.7	107.2	118.0	126.6	92.4	103.0	103.6
1975	101.7	103.3	86.0	102.5	108.6	101.1	121.1	92.0	116.5	103.7	105.2	118.6	113.2	98.0	96.7	95.2
1976	102.2	104.5	89.2	103.4	110.6	103.2	122.7	96.3	128.4	99.8	98.3	114.3	110.6	88.9	96.8	93.6
1976 1st qtr	101.9	103.5	87.6	102.0	106.2	100.6	115.4	94.5	124.0	89.3	99.4	110.9	106.9	88.1	96.3	92.9
2nd qtr	102.4	104.5	88.9	103.6	112.6	105.1	124.9	96.5	127.5	100.2	98.6	115.8	110.3	89.5	97.2	92.9
3rd qtr	101.5	104.1	86.4	103.5	112.5	103.6	127.1	96.2	129.1	99.7	96.5	111.4	112.1	89.5	97.1	92.7
4th qtr	103.2	106.1	94.0	104.5	111.0	103.4	123.4	98.0	132.8	100.0	94.6	119.1	113.3	88.6	96.7	95.8
1977 1st qtr	103.3	107.3	103.1	105.4	110.7	104.5	120.9	96.6	131.4	101.9	97.5	113.4	118.0	85.8	97.6	97.1
1976 Jan	101.2	102.7	90	101.9	103	98	109	91	121	99	100	110	107	85	94	95
Feb	102.6	104.3	87	102.3	107	101	118	94	124	99	99	111	107	89	98	92
Mar	101.9	103.5	86	101.9	109	103	119	98	127	99	99	112	107	91	96	92
Apr	102.3	104.4	83	103.3	113	105	124	99	126	100	98	115	109	92	96	92
May	104.4	106.9	89	106.4	113	107	123	92	126	102	99	116	110	84	103	100
June	100.4	102.2	88	101.1	112	103	127	98	129	98	98	116	111	93	92	87
Jul	101.4	104.0	85	103.7	112	104	126	95	126	101	97	111	111	86	106	90
Aug	100.6	103.1	87	102.5	111	103	125	91	127	99	97	111	112	92	90	95
Sept	102.4	105.2	88	104.4	114	104	130	103	134	99	96	112	113	91	95	93
Oct	102.8	105.6	91	104.7	111	104	122	101	129	100	94	115	112	82	98	98
Nov	103.5	106.4	94	104.9	112	105	123	98	137	100	95	119	113	92	99	94
Dec	103.3	106.2	96	103.8	110	102	125	94	133	100	95	119	114	91	93	95
1977 Jan	103.4	107.4	101	105.1	107	104	113	92	126	102	97	115	117	77	100	97
Feb	103.3	107.3	103	105.7	112	103	123	102	134	101	98	114	118	88	93	98
Mar	103.1	107.1	104	105.5	113	105	127	96	134	103	98	111	119	92	99	96
Apr	103.2	106.7	105	104.7	111	104	123	95	129	103	98	111	120	85	100	98
% change latest 3 months on previous 3 months	−0.2	+0.4	+7.1	+0.7	+2.1	+1.2	+3.3	+3.0	+0.6	+1.7	+2.2	−4.8	+3.6	+2.0	+0.2	+2.3
% change latest 3 months on a year earlier	+0.9	+2.9	+19.3	+2.7	+2.2	+1.6	+3.2	+0.4	+5.2	+2.8	−1.4	−0.5	+10.3	−2.0	+0.7	+6.3

	Manufacturing industries (continued)													Construction	Gas, electricity and water
	Metal manufacture			Textiles, leather and clothing				Bricks, pottery, glass, etc							
	Total	Ferrous	Non-ferrous	Total	Textiles	Leather, leather goods and fur	Clothing and footwear	Total	Bricks, cement, etc	Pottery and glass	Timber, furniture, etc	Paper, printing and publishing	Other manufacturing industries		
Weights	57	43	14	76	49	3	24	27	17	10	22	64	31	146	72
1971	91.3	89.8	95.8	102.2	100.6	103.0	105.4	108.1	107.0	109.8	103.0	97.3	99.8	103.0	103.9
1972	91.4	89.4	97.3	104.5	102.9	104.5	107.8	115.2	115.1	115.3	113.5	102.6	104.3	104.4	111.4
1973	100.0	97.3	108.5	110.1	108.6	101.1	114.6	126.0	123.7	129.5	132.6	112.1	116.6	107.5	118.1
1974	91.7	87.7	104.2	103.1	99.2	94.9	112.2	116.6	108.3	129.5	112.1	108.8	114.5	98.2	118.7
1975	78.6	74.2	92.2	99.5	93.8	92.9	112.2	107.7	99.7	120.4	110.2	95.5	105.5	92.6	120.6
1976	85.2	82.0	95.2	101.5	97.3	95.3	111.1	110.4	100.8	125.4	111.1	97.6	114.5	88.9	123.9
1976 1st qtr	83.2	79.7	94.1	102.5	98.4	98.5	111.5	110.9	104.0	121.5	111.2	95.3	111.4	92.5	127.3
2nd qtr	87.8	84.9	96.9	99.5	95.1	92.8	109.3	108.3	100.5	120.5	109.7	98.1	113.0	90.0	121.5
3rd qtr	84.6	81.5	94.3	101.2	97.1	94.6	110.8	112.3	101.3	129.5	111.5	97.3	112.3	86.2	118.5
4th qtr	85.3	82.0	95.4	102.5	98.4	95.5	112.9	110.2	97.5	130.1	111.9	99.2	121.0	96.9	128.5
1977 1st qtr	85.7	81.2	99.6	105.6	100.2	95.9	118.0	108.4	94.4	130.2	107.5	101.1	121.6	80.3	127.8
1976 Jan	88	86	95	107	105	99	116	107	102	115	113	95	108		118
Feb	82	78	94	102	99	99	111	112	104	125	113	97	113		134
Mar	80	75	93	98	93	99	107	113	106	125	109	95	113		129
Apr	85	81	96	99	96	93	107	109	102	119	110	99	113		123
May	102	101	108	104	99	93	116	109	100	122	116	99	115		121
June	76	73	87	95	91	93	105	107	99	120	103	96	111		120
Jul	86	82	97	100	96	95	108	113	100	133	111	99	107		117
Aug	86	84	91	101	97	95	110	110	100	125	111	97	108		117
Sept	82	78	94	103	98	95	114	114	104	130	113	97	122		122
Oct	90	86	101	103	99	95	112	108	97	126	117	101	119		122
Nov	85	84	89	101	98	95	109	112	97	133	110	97	124		128
Dec	81	76	96	104	99	95	117	111	98	131	108	99	120		136
1977 Jan	92	89	102	107	104	96	115	107	92	131	109	101	121		132
Feb	84	79	98	107	100	96	122	107	95	126	108	102	124		125
Mar	81	75	98	103	97	96	117	111	97	134	105	101	121		124
Apr	82	76	99	101	96	95	113	105	92	125	99	102	117		128
% change latest 3 months on previous 3 months	−4.6	−7.6	+3.3	−0.3	−2.2	+0.1	+3.1	−1.9	−1.2	−2.7	−4.4	+2.4	−1.0		−4.6
% change latest 3 months on a year earlier	..	−1.8	+4.6	+4.1	+2.1	−0.9	+8.2	−3.3	−9.1	+4.3	−5.5	+4.5	+6.6		−2.2

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Industrial expenditure and employment on scientific research and development in 1975

This article presents summary results of the 1975 survey of expenditure and employment on scientific research and development in British industry, covering private industry, public corporations and research associations. It also gives details of the information collected on expenditure and its financing. A further article to be published next week in *Trade and Industry* will give additional results on employment on R&D.

In addition to presenting summary results for 1975 this article also compares the 1975 results with those for earlier years. The previous survey related to 1972 and corresponding results – which have been revised in this article – were published in *Trade and Industry*, 5 September 1974 and 13 February 1975. Similar surveys were held for 1961, 1964 and the years 1966 to 1969 and the results have been brought together by the Central Statistical Office in *Research and Development Expenditure* (Studies in Official Statistics no. 21) and *Research and Development Expenditure and Employment* (Studies in Official Statistics no. 27). The Department of Industry is grateful to industrial companies for the information provided, not only for 1975, when the R&D survey was made compulsory for the first time, but also for information provided for earlier years on a voluntary basis. Definitions and notes are given at the end of the article.

Summary

The total of industrial expenditure on R&D in 1975 is estimated at £1,345 million, an increase of over 60 per cent on the level of expenditure in 1972. This compares with an increase of 21 per cent in the previous three-year period from 1969 to 1972. However, in the latest three-year period there were much larger increases in prices. In the absence of a specific price index for costs of R&D, a general measure of price changes is provided by the index of total home costs which increased by 62 per cent between 1972 and 1975 compared with a 31 per cent increase between 1969 and 1972. This suggests there was probably a small decrease in the volume of expenditure on R&D in the last three-year period, and an appreciable fall in the preceding one. Total employment on R&D in industry, which also provides an indication of the change in real terms, is estimated at just under 180 000 at the end of 1975, and was 2 per cent lower than at the end of 1972. In contrast, in the three years from 1969 to 1972 employment fell by 14 per cent following a fall of 3 per cent in the two preceding years from 1967 to 1969.

The increase in R&D expenditure between 1972 and 1975 was not spread evenly over all product groups; the figures are summarised in table A. Of the products distinguished in table A the largest increases were in chemicals and allied products and mechanical engineering and the smallest in motor vehicles and aerospace. The estimates of employment do not all show similar differences in the changes for the various product groups. Employment increased in chemicals and allied products and fell a little in mechanical engineering. An increase in motor vehicles was accompanied by a fall in aerospace, with a greater fall in electrical engineering despite an increase in expenditure which was similar to the overall average.

TABLE A Changes in R&D expenditure and employment, 1972 to 1975

Selected product groups

	Total expenditure £ million		Percentage change	Total employment Thousands		Percentage change
	1972	1975		1972	1975	
All product groups	838.5	1,345.0	+60	183	180	−2
All manufactured products	811.4	1,295.4	+60	178	174	−3
Chemicals and allied products	140.8	252.2	+79	32	32	+2
Mechanical engineering	55.1	95.5	+78	13	13	−1
Electrical engineering (including electronics)	219.6	352.7	+61	52	48	−8
Motor vehicles	58.3	88.5	+52	14	15	+8
Aerospace	208.4	291.9	+40	35	35	−2

Total expenditure and financing

Almost all of the total expenditure on scientific R&D of £1,345 million was for work carried out within industry itself (ie intra-mural) and only £12.2 million, or less than 1 per cent was for work contracted out by industry to other sectors, eg government establishments, universities etc. The figures are given in table B together with those for earlier surveys. Expenditure on work contracted out has always been small but has fluctuated slightly in importance.

TABLE B Analysis of total expenditure on R&D, 1967 to 1975

Private industry, public corporations and industrial research associations

£ million

	1967	1968	1969	1972	1975
R&D expenditure					
Total	611.5	647.6	693.9	838.5	1,345.0
Carried out within industry – total	604.5	638.7	680.3	830.5	1,332.8
Private industry	549.9	583.3	619.0	742.5	1,177.7
Public corporations	41.6	41.0	44.9	69.2	124.0
Research associations	13.0	14.5	16.5	18.8	31.1
Put out by industry to other sectors	7.0	8.9	13.5	8.0	12.2
Funds for industry's R&D					
Total	611.5	647.6	693.9	838.5	1,345.0
Government funds	178.0	191.5	216.5	277.3	413.9
Overseas funds	23.3	29.1	32.6	54.0	84.9
Other funds (mainly own funds)	410.2	427.0	444.8	507.2	846.2
Per cent of total	100	100	100	100	100
Government funds	29	30	31	33	31
Overseas funds	4	4	5	6	6
Other funds (mainly own funds)	67	66	64	60	63

While at £1,345 million, total expenditure was over 60 per cent higher than the revised estimate for 1972, expenditure on R&D within private industry increased by 59 per cent. Expenditure within public corporations increased by 79 per cent and that by research associations increased by 65 per cent. The probable fall in total R&D expenditure in real terms between 1972 and 1975 is thus likely to have been confined to work carried out in private industry. This is confirmed by the estimate of employment as the fall was concentrated in private industry and employment in public corporations and research associations was little changed. In 1975, 88 per cent of total R&D expenditure was on work carried out in private industry, compared with 89 per cent in 1972.

Distribution of expenditure by product groups

Changes in R&D expenditure since 1967 in the main product groups are summarised in table C. It needs to be remembered that expendi-

TABLE C Total industrial expenditure on R&D, 1967 to 1975

Selected product groups

	1967	1968	1969	1972	1975
	£ million				
All product groups	611.5	647.6	693.9	838.5	1,345.0
All manufactured products	600.7	638.0	683.5	811.4	1,295.4
of which:					
Chemicals and allied products	88.1	96.0	108.6	140.8	252.2
Mechanical engineering	62.3	63.7	61.1	55.1	95.5
Electrical engineering (including electronics)	153.2	168.3	184.7	219.6	352.7
Motor vehicles	45.6	45.2	49.2	58.3	88.5
Aerospace	143.7	152.2	159.1	208.4	291.9
	Index 1967 = 100				
All product groups	100	106	113	137	220
All manufactured products	100	106	114	135	216
of which:					
Chemicals and allied products	100	109	123	160	286
Mechanical engineering	100	102	98	88	153
Electrical engineering (including electronics)	100	110	121	143	230
Motor vehicles	100	99	108	128	194
Aerospace	100	106	111	145	203

ture in table C is at current prices which reflect both price and volume changes, and in particular price changes were substantial between 1972 and 1975. For example in mechanical engineering the fall in the volume of R&D (as judged by employment) appears to have been more than counterbalanced by price increases, up to 1972. During the last three years price changes were the dominant factor. A detailed analysis of the 1975 results by sector and by product group is given in appendix table 1.

Financing of R&D expenditure

For industrial R&D as a whole, the percentage of finance provided by government was 31 per cent in 1975 as compared with 33 per cent in 1972 (see table B). However, the percentage of R&D financed by government was particularly high in 1972 and the percentage of government financing in 1975 was similar to that in 1969. Public corporations received a much smaller percentage of finance from the government – 2 per cent in 1975. The high figure of 6 per cent in 1972 was due to initial finance, on the establishment of the Civil Aviation Authority. The proportion of finance of research associations from government sources in 1975 (29 per cent) was similar to that in 1972 (28 per cent) even though the associations are no longer grant aided and government aid is now entirely in the form of contracts.

Further details of government financing of R&D by private industry are given in table D – a table which cannot be published in full product group details because it would involve disclosure of confidential information. The total government finance received by private industry has been related to its intra-mural expenditure – the amount of this finance being passed on to other sectors being thought to be negligible. It will be seen that in 1975, 34 per cent of intra-mural R&D (by private industry on manufacturing) was financed by government, compared with 31 per cent for industrial R&D as a whole. This percentage varied widely from one product group to another. For aerospace it was over 80 per cent but this percentage was lower than that at the two previous surveys and the reduction in government financing of aerospace accounts for all the fall in the share of government financing for manufactured products from 1972 to 1975. For all the other product groups shown in the table the share of government financing was either maintained or increased. For electrical engineering, including electronics, the proportion of finance from government was 44 per cent in 1975. For electronics alone the proportion was 52 per cent, considerably higher than in the preceding years. For mechanical engineering products, the proportion of finance derived from government sources in 1975 remained at the low level of 7 per cent after ranging between 15 and 20 per cent in the earlier years from 1967 to 1969.

TABLE D Finance by government of R&D expenditure in private industry, 1967 to 1975

Selected product groups — Per cent of total

	1967	1968	1969	1972	1975
All manufactured products	32	32	34	37	34
Chemicals and allied products	2	2	2	1	3
Mechanical engineering	19	15	16	9	7
Electrical engineering (including electronics)	36	31	32	41	44
of which: electronics	45	38	39	46	52
Motor vehicles	2	3	—	1	1
Aerospace	75	84	92	85	82

A detailed analysis by product group of the sources of funds for total industrial expenditure is given in appendix table 2. This information cannot be directly related to that in summary table D, because the latter relates only to the intra-mural expenditure of private industry alone.

Current and capital expenditure

Of the total intra-mural expenditure on R&D of £1,333 million in 1975, capital expenditure amounted to £100 million, or 8 per cent of the total. As in 1969 and 1972, the percentage of capital expenditure was markedly higher for public corporations, at 13 per cent in 1975. Table E summarises the position in 1975; an analysis by product group for the last five surveys is given in appendix table 3.

Capital expenditure in 1975 is analysed in detail by sector and by product group in appendix table 4.

TABLE E Capital and current expenditure on R&D in industry 1975

	Total	Capital	Current
	£ million		
All industry	1,332.8	100.1	1,232.7
Private industry	1,177.7	81.7	1,096.1
Public corporations	124.0	15.7	108.2
Research associations	31.1	2.7	28.4
	Per cent		
All industry	100	8	92
Private industry	100	7	93
Public corporations	100	13	87
Research associations	100	9	91

The breakdown of capital expenditure between land and buildings and plant and equipment is shown in table F, both in total and for selected product groups. About one-quarter of the capital expenditure was on land and buildings, a proportion similar to that in 1972. Again as in 1972, the largest amount of capital expenditure – about one-third of the total – was in the product group chemicals and allied products, and capital expenditure in electrical engineering was next largest – about one-fifth of the total.

TABLE F Capital expenditure: analysis by type of R&D expenditure 1975

Selected product groups — £ million

	Total	Land and buildings	Plant and equipment
All industry	100.1	24.7	75.4
Private industry	81.7	17.9	63.8
Public corporations	15.7	5.8	9.9
Research associations	2.7	1.0	1.7
Chemicals and allied products	32.2	10.2	22.0
Mechanical engineering	7.2	1.7	5.5
Electrical engineering (including electronics)	20.3	3.6	16.7
Motor vehicles	3.9	0.6	3.3
Aerospace	9.8	0.7	9.1

Current expenditure is analysed in two ways: first (in appendix table 5) according to type of expenditure – wages and salaries, materials and equipment, and other expenditure, and second (in appendix table 6) according to the type of work – basic and applied research and development.

A summary of the analysis by type of expenditure is given in table G. It shows that wages and salaries comprised over half of all current expenditure on R&D and in the public corporations and research associations the proportion was about three-fifths. These results are very similar to those obtained for 1972 and 1969. For the individual product groups, wages and salaries formed the largest percentage of current expenditure for motor vehicles and for chemicals and allied products. They were a markedly lower proportion for aerospace (two-fifths) where expenditure on materials and equipment is relatively greater.

TABLE G Current expenditure 1975: analysis by type of R&D expenditure

Selected product groups — Per cent

	Total	Salaries and wages	Materials and equipment	Other
All industry	100	55	21	24
Private industry	100	54	22	25
Public corporations	100	60	22	18
Research associations	100	62	12	27
Chemicals and allied products	100	64	12	24
Mechanical engineering	100	56	24	20
Electrical engineering (including electronics)	100	53	23	24
of which: electronics	100	52	23	24
Motor vehicles	100	69	14	17
Aerospace	100	40	31	29

Table H summarises the analysis of current expenditure by type of work, full details of which are given in appendix table 6. As in 1972 private industry devoted the greater part of its expenditure to development – in 1975 about three-quarters. Public corporations have an interest in rather long-term projects for their own use and over half their expenditure was on applied research. The percentage of total expenditure devoted to basic research was largest for the research associations, where it was nearly one-tenth of the total.

TABLE H Type of R&D work 1975

Analysis of current expenditure by sector — Per cent

	Total	Basic	Applied	Development
All industry	100	3	25	72
Private industry	100	3	21	75
Public corporations	100	1	54	45
Research associations	100	8	61	31

Definitions and notes

The definitions are based on those internationally agreed by the OECD and summarised in the Central Statistical Office publication *Research and Development Expenditure and Employment*, Studies in Official Statistics no. 27.

Scientific research and development. Research in the social sciences is excluded from this inquiry. R&D is defined for the purposes of this inquiry in the following categories:

Basic or fundamental research. Work undertaken primarily for the advancement of scientific knowledge without a specific practical application in view;

Applied research. Research undertaken with either a general or a particular application in view;

Development. The use of the results of basic and applied research directed to the introduction of useful materials, processes, products,

APPENDIX TABLE 1 Total expenditure on R&D carried out within or financed by industry in United Kingdom 1975

£ million

	Total expenditure	Research and development carried out within industry				Research and development financed by industry and carried out in other sectors (4)
		Total	Private industry	Public corporations	Research associations	
ALL PRODUCT GROUPS	1,345.0	1,332.8	1,177.7	124.0	31.1	12.2
Mining and quarrying (1)	6.4	5.4	4.6	0.7	–	1.1
Manufactured products						
Total	1,295.4	1,286.3	1,165.3	98.8	22.2	9.1
Food, drink, tobacco	50.3	49.5	47.7	0.1	1.7	0.9
Chemical and allied products:						
Total	252.2	246.6	238.7	5.4	2.4	5.6
Petroleum products	18.3	18.1	18.1	—	—	0.2
Pharmaceutical products	82.6	79.9	79.9	—	—	2.8
Paint	7.2	7.2	6.8	—	0.4	—
Synthetic rubber, resins and plastic materials	26.8	26.7	25.5	0.1	1.1	0.1
Other chemicals	117.3	114.8	108.5	5.3	0.9	2.5
Iron and steel	27.7	27.5	3.5	23.1	1.0	0.2
Non-ferrous metals	8.7	8.6	7.1	0.3	1.3	0.1
Mechanical engineering:						
Total	95.5	94.9	62.6	30.1	2.3	0.6
Metal working machine tools	5.7	5.7	4.3	—	1.3	—
Textile machinery	3.6	3.6	3.4	—	0.2	—
Mechanical handling and contractors' plant	7.6	7.6	5.6	1.9	—	0.1
Industrial plant and steelwork	27.8	27.4	7.4	19.4	0.6	0.3
Other machinery and equipment	50.8	50.7	41.8	8.7	0.2	0.2
Scientific instruments and systems	26.1	25.9	21.1	3.8	1.0	0.2
Electrical engineering:						
Total	352.7	352.2	315.4	34.9	2.0	0.5
Electronic computers	51.0	50.9	50.3	0.4	0.3	0.1
Electronic components and apparatus including telecommunications	228.6	228.3	200.6	27.5	0.2	0.3
Electrical machinery	33.8	33.8	27.7	4.7	1.3	—
Insulated wires and cables	11.4	11.4	9.0	2.2	0.2	0.1
Domestic appliances	6.5	6.4	6.3	0.1	—	—
Miscellaneous electrical goods	21.5	21.4	21.4	—	—	—
Ships and marine engines	16.2	16.1	14.0	—	2.1	0.1
Motor vehicles	88.5	88.3	86.9	—	1.4	0.1
Aerospace (including air cushion vehicles)	291.9	291.5	291.5	—	0.1	0.3
Metal goods not elsewhere specified	11.1	11.1	9.9	0.9	0.3	0.1
Textiles and man-made fibres	26.3	26.1	24.5	—	1.6	0.1
Leather, leather goods, fur, clothing and footwear	1.6	1.6	0.7	—	0.9	—
Building materials and abrasives	6.8	6.7	6.4	0.1	0.3	0.1
Pottery, china and glass	11.1	11.1	10.5	—	0.5	—
Timber and furniture	1.6	1.6	0.6	—	1.0	—
Paper, paper products and publishing	8.2	8.2	7.4	0.1	0.7	—
Rubber and rubber goods	9.9	9.8	8.5	—	1.3	—
Other manufactures	9.0	8.9	8.5	0.1	0.3	0.1
Construction (2)	6.1	6.1	2.1	0.3	3.6	—
Utilities and services (3)	37.1	35.0	5.6	24.2	5.2	2.1

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety, etc.
(4) Government establishments, universities, non-profit organisations.

devices and systems, or the improvement of existing ones. It should include the prototype or pilot plant stage and all work done on development contracts with government departments, the Atomic Energy Authority and similar public bodies. Firms in the aerospace industry should include expenditure on development batches.

The guiding line to distinguish R&D activity from non-research activity is the presence or absence of an element of novelty or innovation. If the activity follows an established pattern it should be excluded; if it departs from routine and breaks new ground it should be included.

The distinctions between basic research, applied research and development are not clear cut. Interpretation of these terms is sometimes difficult and may well be different for different product groups.

Industry. Industry is defined here as consisting of three parts, private industry, public corporations and the industrial research associations.

Private industry. The inquiry was carried out by the Business Statistics Office (BSO) and a revised register was used for 1975. Using the census of production registers an initial inquiry was made to some 5000 companies asking if they carried out any R&D. As a result of this inquiry some questionnaires were despatched to all companies employing over 100 employees and reporting any expenditure on research and development, and to those companies who did not respond to the initial inquiry. On this occasion the inquiry was carried out under the Statistics of Trade Act 1947 and the expenditure recorded on actual returns received for 1975 accounts for 97 per cent of the total estimate, as compared with 94 per cent for the correspond

Appendix table 3 (see page 642) follows appendix table 4

APPENDIX TABLE 2 **Source of finance for research and development carried out within or financed by industry in United Kingdom 1975**

£ million

	All sources of finance	Industry		
		Private industry (1) (5)	Public corporations	Government
ALL PRODUCT GROUPS	1,345.0	789.0	142.0	413.9
Manufactured products				
Total	1,295.4	772.9	114.8	407.7
Food, drink, tobacco	50.3	49.8	0.1	0.5
Chemical and allied products:				
Total	252.2	237.3	7.4	7.5
Pharmaceutical products	82.6	82.6	—	0.1
Paint	7.2	7.1	—	0.1
Synthetic resins and plastic materials	26.8	26.3	0.1	0.4
Other chemicals (2)	135.6	121.3	7.3	7.0
Iron and steel	27.7	4.0	23.3	0.4
Non-ferrous metals	8.7	7.9	0.3	0.4
Mechanical engineering:				
Total	95.5	57.2	32.9	5.4
Metal working machine tools	5.7	5.1	0.2	0.4
Textile machinery	3.6	3.5	0.1	—
Mechanical handling and contractors' plant	7.6	5.3	2.4	—
Industrial plant and steelwork	27.8	6.1	21.2	0.4
Other machinery and equipment	50.8	37.2	9.1	4.6
Scientific instruments and systems	26.1	19.7	4.0	2.4
Electrical engineering:				
Total	352.7	167.0	45.2	140.5
Electronics and telecommunications (including computers)	279.6	113.6	35.9	130.1
Electrical machinery	33.8	20.5	6.8	6.5
Insulated wires and cables	11.4	8.7	2.3	0.5
Domestic appliances	6.5	24.3	0.1	3.4
Miscellaneous electrical goods	21.5		0.1	
Ships and marine engines	16.2	8.5	—	7.7
Motor vehicles	88.5	87.0	—	1.4
Aerospace (including air cushion vehicles)	291.9	52.3	—	239.5
Metal goods not elsewhere specified	11.1	9.9	1.0	0.2
Textiles and man-made fibres	26.3	25.8	0.1	0.4
Leather, leather goods, fur, clothing and footwear	1.6	1.4	—	0.2
Building materials and abrasives	6.8	6.5	0.2	0.1
Pottery, china and glass	11.1	10.8	—	0.3
Timber and furniture	1.6	1.4	—	0.2
Paper, paper products and publishing	8.2	7.9	0.1	0.2
Other manufacturers (3)	18.9	18.4	0.2	0.3
Non-manufacturing (4)	49.6	16.1	27.2	6.3

(1) The total of intra-mural work assuming all sub-contracted work represents a double count. This figure includes finance from overseas.
(2) Including petroleum products.
(3) Including rubber and rubber products.
(4) Including mining and quarrying, construction and utilities and services (see full notes to table 1).
(5) For purposes of this table research associations are included in private industry.

APPENDIX TABLE 4 **Capital expenditure on R&D carried out within private industry, public corporations and research associations in United Kingdom 1975**

£ million

	All industry	Private industry	Public corporations	Research associations
	Total	Total	Total	Total
ALL PRODUCT GROUPS	100.1	81.7	15.7	2.7
Mining and quarrying (1)	0.3	0.2	0.1	—
Manufactured products				
Total	96.6	80.7	14.1	1.8
Food, drink, tobacco	6.5	6.4	—	0.1
Chemical and allied products				
Total	32.2	31.2	0.7	0.2
Petroleum products	3.1	3.1	—	—
Pharmaceutical products	12.6	12.6	—	—
Paint	0.2	0.1	—	—
Synthetic resins and plastic materials	2.9	2.7	—	0.2
Other chemicals	13.4	12.6	0.7	0.1
Iron and steel	5.8	0.2	5.5	0.1
Non-ferrous metals	1.1	1.0	—	0.1
Mechanical engineering:				
Total	7.2	3.0	4.0	0.2
Metal working machine tools	0.5	0.4	—	0.1
Textile machinery	0.1	0.1	—	—
Mechanical handling and contractors' plant	0.5	0.4	0.1	—
Industrial plant and steelwork	3.7	0.4	3.2	0.1
Other machinery and equipment	2.4	1.7	0.7	—
Scientific instruments and systems	1.4	0.9	0.4	0.1
Electrical engineering:				
Total	20.3	16.8	3.5	0.1
Electronic computers	4.2	4.2	—	—
Electronic components and apparatus, including telecommunications	10.8	9.1	1.7	—
Electrical machinery	2.2	0.8	1.3	—
Insulated wires and cables	1.3	0.7	0.5	—
Domestic appliances	0.2	0.2	—	—
Miscellaneous electrical goods	1.8	1.8	—	—
Ships and marine engines	0.4	0.3	—	0.1
Motor vehicles	3.9	3.8	—	0.1
Aerospace (including air cushion vehicles)	9.8	9.8	—	—
Metal goods not elsewhere specified	0.9	0.8	—	—
Textiles and man-made fibres	2.0	2.0	—	—
Leather, leather goods, fur, clothing and footwear	0.1	—	—	—
Building materials and abrasives	0.6	0.6	—	—
Pottery, china and glass	1.6	1.6	—	—
Timber and furniture	0.2	—	—	0.2
Paper, paper products and publishing	0.8	0.7	—	0.1
Rubber and rubber goods	1.0	0.7	—	0.3
Other manufactures	0.8	0.8	—	—
Construction (2)	0.3	0.2	—	0.1
Utilities and services (3)	2.9	0.7	1.5	0.8

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety etc.

ing estimate of total expenditure in the previous survey for 1972. There was a significant reduction in the number of enterprises thought to be spending sizeable sums on research and development for which non-response estimates had to be made either in part or in whole. Private industry continues to include companies in which the government has acquired a major shareholding; companies in this category include Rolls-Royce Ltd, British Leyland Motor Corporation Ltd, Ferranti Ltd and British Nuclear Fuels Ltd. The figures for construction do not include all development work undertaken on civil engineering on site, owing to the difficulty of distinguishing it from other activities.

Public corporations. All public corporations known to engage in scientific R&D were surveyed. The list of public corporations is that for the national accounts. Following national accounts practice, the Post Office is regarded as a public corporation and the Atomic Energy Authority is included in government.

Industrial research associations. Information on scientific R&D by the research associations was obtained directly from them. None of the research associations is now grant-aided.

Total industrial expenditure. In arriving at the total of expenditure for all industry, only the money spent in industry's own establishments *plus* R&D work put out by industry to other sectors – that is to government establishments, universities, etc – is counted. It is assumed that R&D work contracted out within industry is covered by the returns of the contractor.

Product groups. Products commonly associated in production and usually similar in nature or manner of production have been grouped together. It should be noted that product groups generally correspond quite closely to industry groups, since establishments in manufacturing industry are basically defined in terms of their principal products. See notes to the Report on the Census of Production (Business Monitor PA1001). The classification must be regarded as approximate since the allocation of research and development to an individual product group is not always straightforward and a single

Appendix table 4 (see page 641) precedes appendix table 3

APPENDIX TABLE 3 **Total expenditure on R&D carried out within private industry in the United Kingdom 1967, 1968, 1969, 1972 and 1975**

£ million

	Total expenditure					Current expenditure					Capital expenditure				
	1967	1968	1969	1972	1975	1967	1968	1969	1972	1975	1967	1968	1969	1972	1975
ALL PRODUCT GROUPS	549.9	583.3	619.0	742.5	1,177.7	490.0	530.1	559.5	694.6	1,096.1	59.9	53.3	59.5	47.9	81.7
Mining and quarrying (1)	1.3	1.0	0.8	2.0	4.6	0.7	0.9	0.8	1.8	4.5	0.6	0.1	0.1	0.1	0.2
Manufactured products															
Total	543.4	578.0	614.1	736.7	1,165.3	484.5	525.1	554.9	689.1	1,084.7	58.9	52.9	59.3	47.6	80.7
Food, drink and tobacco	18.1	18.8	20.7	24.6	47.7	14.7	15.5	17.5	21.1	41.3	3.4	3.3	3.3	3.5	6.4
Chemical and allied products:															
Total	82.2	90.8	101.9	135.2	238.7	70.1	76.4	84.5	117.3	207.5	12.1	14.6	17.4	17.8	31.2
Petroleum products	10.9	11.9	11.5	13.6	18.1	9.8	10.6	10.2	12.2	14.9	1.0	1.3	1.3	1.4	3.1
Pharmaceutical products	16.4	18.9	24.2	41.9	79.8	14.2	15.5	18.6	33.4	67.3	2.2	3.5	5.6	8.5	12.6
Paint	3.8	3.4	2.7	3.8	6.8	2.8	3.3	2.5	3.7	6.7	1.0	0.1	0.1	0.1	0.1
Synthetic resins and plastic materials	12.9	13.0	13.9	14.4	25.5	9.1	9.9	11.4	12.7	22.7	3.9	3.2	2.5	1.7	2.7
Other chemicals	38.2	43.6	49.6	61.5	108.5	34.2	37.1	41.7	55.4	95.9	4.0	6.5	7.9	6.1	12.6
Iron and steel	3.0	3.1	2.6	2.0	3.5	2.8	2.7	2.3	1.7	3.3	0.2	0.4	0.3	0.3	0.2
Non-ferrous metals	6.0	5.9	6.8	5.7	7.1	5.1	5.1	6.2	4.9	6.0	0.9	0.8	0.6	0.7	1.0
Mechanical engineering:															
Total	51.3	52.4	45.2	36.2	62.6	47.9	48.8	42.3	34.7	59.5	3.4	3.6	3.0	1.5	3.0
Metal working machine tools	5.4	5.2	4.2	1.6	4.3	4.9	4.5	3.5	1.5	3.9	0.5	0.8	0.7	0.1	0.4
Textile machinery	1.9	2.3	2.1	2.4	3.4	1.8	2.3	1.9	2.3	3.3	—	—	0.2	0.1	0.1
Mechanical handling and contractors' plant	3.6	3.4	4.0	2.5	5.6	3.5	3.2	3.8	2.4	5.2	0.1	0.1	0.1	0.2	0.4
Industrial plant and steelwork	9.0	8.9	7.6	4.5	7.4	7.8	8.1	7.2	4.3	7.0	1.2	0.8	0.4	0.2	0.4
Other machinery and equipment	31.4	32.5	27.4	25.2	41.8	29.9	30.8	25.8	24.3	40.1	1.6	1.8	1.6	1.1	1.7
Scientific instruments and systems	12.7	14.8	16.2	19.9	21.1	11.9	14.0	15.1	18.7	20.2	0.8	0.8	1.1	1.2	0.9
Electrical engineering:															
Total	136.0	148.6	162.2	193.9	315.4	128.6	140.7	153.2	185.0	298.6	7.4	7.9	9.1	8.9	16.8
Electronic computers			22.9	27.0	50.3			22.2	25.8	46.1			0.7	1.2	4.2
Electronic components and apparatus including telecommunications	105.6	116.7				100.6	110.9				5.0	5.8			
			105.1	133.3	200.6			99.8	127.2	191.5			5.3	6.0	9.1
Electrical machinery	16.2	16.8	20.4	19.6	27.7	14.5	15.6	18.2	18.9	26.9	1.7	1.2	2.2	0.7	0.8
Insulated wires and cables	3.8	3.3	3.5	4.2	9.0	3.5	3.0	3.3	3.6	8.3	0.3	0.3	0.2	0.5	0.7
Domestic appliances	2.4	2.6	2.8	2.7	6.3	2.3	2.5	2.7	2.5	6.1	0.1	0.1	0.1	0.1	0.2
Miscellaneous electrical goods	8.0	9.3	7.5	7.2	21.4	7.7	8.7	7.0	6.9	19.7	0.3	0.6	0.5	0.3	1.8
Ships and marine engines	1.8	2.2	3.8	5.9	14.0	1.5	1.9	3.8	5.7	13.7	0.3	0.3	—	0.1	0.3
Motor vehicles	44.0	43.7	48.2	57.2	86.9	33.0	38.5	39.7	53.0	83.1	11.0	5.2	8.5	4.2	3.8
Aerospace (including air cushion vehicles)	143.2	150.1	157.3	208.1	291.5	129.3	139.3	147.4	203.6	281.7	13.9	10.8	9.8	4.4	9.8
Metal goods not elsewhere specified	6.6	7.3	8.2	7.9	9.9	6.1	6.6	7.1	6.7	9.0	0.5	0.7	1.1	1.2	0.8
Textiles and man-made fibres	10.8	11.7	14.5	12.2	24.5	9.6	10.8	12.8	11.4	22.5	1.2	0.9	1.7	0.8	2.0
Leather, leather goods, fur, clothing and footwear	1.0	0.9	0.9	0.5	0.7	0.9	0.9	0.9	0.4	0.7	0.1	—	—	—	—
Building materials and abrasives	3.5	4.4	4.2	3.9	6.4	2.9	3.6	3.4	3.5	5.8	0.6	0.8	0.7	0.4	0.6
Pottery, china and glass	5.8	6.6	6.8	7.2	10.5	4.8	5.5	5.8	6.5	9.0	1.0	1.1	1.0	0.7	1.6
Timber and furniture	0.7	0.3	0.5	0.4	0.6	0.6	0.3	0.4	0.4	0.6	—	—	—	—	—
Paper, paper products and publishing	7.4	7.2	4.9	5.1	7.4	6.9	6.6	4.3	4.7	6.7	0.5	0.6	0.6	0.4	0.7
Rubber and rubber goods	5.2	5.8	4.3	5.1	8.5	4.4	5.0	3.8	4.8	7.8	0.8	0.8	0.4	0.4	0.7
Other manufactures	4.0	3.1	4.9	5.8	8.5	3.4	2.9	4.4	4.9	7.7	0.6	0.2	0.5	0.8	0.8
Construction (2)	4.0	3.1	2.4	1.6	2.1	3.6	3.0	2.3	1.6	2.0	0.4	0.2	0.1	0.1	0.2
Utilities and services (3)	1.3	1.2	1.6	2.2	5.6	1.3	1.1	1.6	2.1	5.0	—	0.1	—	0.1	0.7

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety, etc.

programme of research and development sometimes covers a range of product groups. Comparisons over time may be affected by differences in the allocation of research programmes to product groups.

Employment. Industry was asked to include all persons who spent more than half of the working week on R&D activities.

Time period to which surveys relate. Private industry was asked to make returns for either the calendar year 1975 or for a business year ending between 5 April 1975 and 5 April 1976. In the text and tables references to the year 1975 cover both figures for the calendar year and other years ending in 1975/76. Figures for earlier years cover the corresponding time periods.

Amendments to 1972 figures. In the light of the information received for 1975, some amendments have been made to the estimates for 1972. The product groups affected are textile machinery, motor vehicles and paper. The total expenditure on research and development in these product groups has been increased by £1.0 million, £1.0 million and £1.3 million respectively, amounting to an additional £3.3 million on total expenditure by private industry. The total number of employees has been increased by 0.9 thousand of whom 0.3 thousand were scientists and engineers, 0.2 thousand were technicians and 0.3 thousand were support staff.

Rounding of figures. There may be discrepancies between the sum of constituent items and the total shown because they have been rounded independently. The following symbols have been used throughout the tables:

— nil or less than half the final digit shown
.. not available

Inquiries: 01-211 5156.

APPENDIX TABLE 5 **Current expenditure on R&D carried out within private industry, public corporations and research associations in United Kingdom: analysis by type of expenditure 1975**

£ million

	All industry				Private industry				Public corporations				Research associations			
	Total	Salaries and wages	Materials and equipment	Other	Total	Salaries and wages	Materials and equipment	Other	Total	Salaries and wages	Materials and equipment	Other	Total	Salaries and wages	Materials and equipment	Other
ALL PRODUCT GROUPS	1,232.7	671.9	262.6	298.1	1,096.1	589.1	235.9	271.1	108.2	65.4	23.4	19.5	28.4	17.5	3.3	7.6
Mining and quarrying (1)	5.1	3.0	0.9	1.1	4.5	2.6	0.8	1.0	0.6	0.4	0.1	0.1	—	—	—	—
Manufactured products																
Total	1,189.8	647.4	254.5	287.8	1,084.7	582.3	233.9	268.5	84.7	52.5	18.0	14.2	20.4	12.7	2.6	5.2
Food, drink, tobacco	43.0	26.3	7.1	9.6	41.3	25.1	7.0	9.2	0.1	—	—	—	1.6	1.1	0.2	0.3
Chemical and allied products:																
Total	214.4	136.6	26.6	51.2	207.5	132.2	25.6	49.8	4.7	2.9	0.8	1.0	2.2	1.5	0.3	0.4
Petroleum products	14.9	10.1	1.5	3.4	14.9	10.1	1.5	3.4	—	—	—	—	—	—	—	—
Pharmaceutical products	67.3	39.3	10.6	17.3	67.3	39.3	10.6	17.3	—	—	—	—	—	—	—	—
Paint	7.0	5.4	0.3	1.3	6.7	5.1	0.3	1.2	—	—	—	—	0.3	0.2	—	0.1
Synthetic resins and plastic materials	23.8	15.1	3.2	5.5	22.8	14.5	3.0	5.2	0.1	—	—	—	1.0	0.6	0.1	0.3
Other chemicals	101.4	66.7	11.0	23.7	95.9	63.2	10.2	22.6	4.6	2.9	0.8	1.0	0.9	0.6	0.1	0.1
Iron and steel	21.8	14.5	2.5	4.7	3.3	2.0	0.6	0.7	17.6	12.1	1.9	3.6	0.9	0.4	0.1	0.4
Non-ferrous metals	7.5	4.6	1.2	1.7	6.0	3.7	1.0	1.3	0.3	0.1	—	0.1	1.2	0.8	0.2	0.2
Mechanical engineering:																
Total	87.7	49.5	21.1	17.1	59.5	33.5	14.2	11.8	26.1	14.8	6.4	4.9	2.1	1.2	0.5	0.5
Metal working machine tools	5.1	2.9	1.2	1.1	3.9	2.3	0.9	0.8	—	—	—	—	1.2	0.6	0.3	0.3
Textile machinery	3.4	2.2	0.8	0.4	3.3	2.1	0.8	0.4	—	—	—	—	0.2	0.1	—	—
Mechanical handling and contractors' plant	7.1	3.9	1.8	1.3	5.2	2.8	1.3	1.1	1.8	1.1	0.5	0.2	—	—	—	—
Industrial plant and steelwork	23.8	14.0	4.9	4.9	7.0	4.1	1.6	1.3	16.2	9.6	3.2	3.5	0.6	0.3	0.2	0.1
Other machinery and equipment	48.3	26.5	12.4	9.4	40.1	22.3	9.7	8.1	8.0	4.1	2.7	1.2	0.2	0.1	—	0.1
Scientific instruments and systems	24.5	14.2	4.0	6.3	20.2	11.7	3.0	5.4	3.4	1.9	0.8	0.7	0.9	0.6	0.2	0.2
Electrical engineering:																
Total	331.9	175.9	75.5	80.5	298.6	155.0	67.1	76.4	31.4	19.8	8.0	3.6	1.9	1.1	0.4	0.5
Electronic computers	46.7	29.0	3.8	13.8	46.1	28.7	3.7	13.7	0.4	0.2	0.1	0.1	0.2	0.1	0.1	0.1
Electronic components and apparatus including telecommunications	217.5	109.5	57.8	50.2	191.5	92.7	51.1	47.7	25.8	16.7	6.7	2.5	0.2	0.1	—	0.1
Electrical machinery	31.6	17.0	7.3	7.3	26.9	14.3	6.2	6.4	3.4	1.9	0.9	0.6	1.3	0.7	0.2	0.3
Insulated wires and cables	10.1	5.8	1.8	2.5	8.3	4.7	1.4	2.2	1.7	0.9	0.4	0.3	0.2	0.1	—	—
Domestic appliances	6.3	4.4	0.7	1.2	6.1	4.4	0.7	1.1	0.1	0.1	—	0.1	—	—	—	—
Miscellaneous electrical goods	19.7	10.2	4.0	5.4	19.7	10.2	4.0	5.4	—	—	—	—	—	—	—	—
Ships and marine engines	15.7	5.7	5.6	4.4	13.7	4.5	5.5	3.7	—	—	—	—	2.0	1.2	0.2	0.6
Motor vehicles	84.4	58.3	12.0	14.1	83.1	57.5	11.8	13.8	—	—	—	—	1.3	0.8	0.2	0.3
Aerospace (including air cushion vehicles)	281.7	113.2	86.4	82.2	281.7	113.2	86.4	82.1	—	—	—	—	—	—	—	—
Metal goods not elsewhere specified	10.2	6.2	1.8	2.2	9.0	5.5	1.6	1.9	0.9	0.6	0.1	0.2	0.3	0.1	—	0.1
Textiles and man-made fibres	24.1	15.0	4.1	5.1	22.5	13.9	3.9	4.7	—	—	—	—	1.6	1.0	0.1	0.4
Leather, leather goods, fur, clothing and footwear	1.6	1.1	0.1	0 3	0.7	0.5	0.1	0.1	—	—	—	—	0.9	0.6	—	0.3
Building materials and abrasives	6.2	4.1	10.9	1.2	5.8	4.0	0.8	1.0	0.1	—	—	—	0.3	0.1	—	0.1
Pottery, china and glass	9.5	6.0	2.0	1.5	9.0	5.7	2.0	1.3	—	—	—	—	0.5	0.3	—	0.2
Timber and furniture	1.4	0.8	0.3	0.3	0.6	0.3	0.2	0.1	—	—	—	—	0.8	0.5	0.1	0.2
Paper, paper products and publishing	7.4	4.7	1.1	1.6	6.7	4.3	1.0	1.3	0.1	—	—	—	0.7	0.4	—	0.2
Rubber and rubber goods	8.8	5.5	1.1	2.2	7.8	4.7	1.0	2.0	—	—	—	—	1.0	0.7	0.1	0.3
Other manufactures	8.1	5.1	1.2	1.8	7.7	4.9	1.1	1.7	0.1	0.1	—	—	0.2	0.1	—	0.1
Construction (2)	5.7	3.1	0.7	1.9	2.0	1.1	0.4	0.4	0.3	0.1	0.1	0.1	3.5	1.8	0.3	1.4
Utilities and services (3)	32.1	18.3	6.4	7.3	5.0	3.0	0.8	1.1	22.7	12.3	5.2	5.2	4.4	3.0	0.5	1.0

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railway, road, sea and air transport systems, industrial health and safety, etc.

APPENDIX TABLE 6 **Current expenditure on R&D carried out within private industry, public corporations and research associations in United Kingdom: analysis by type of work 1975**

£ million

	All industry				Private industry				Public corporations				Research associations			
	Total	Basic	Applied	Development	Total	Basic	Applied	Development	Total	Basic	Applied	Development	Total	Basic	Applied	Development
ALL PRODUCT GROUPS	1,232.7	41.4	308.7	882.5	1,096.1	38.2	233.4	824.5	108.2	1.0	58.1	49.2	28.4	2.3	17.2	8.8
Mining and quarrying (1)	5.1	0.2	2.0	2.8	4.5	0.2	1.9	2.4	0.6	—	0.1	0.4	—	—	—	—
Manufactured products Total	1,189.8	40.4	289.5	859.9	1,084.7	37.6	229.9	817.1	84.7	0.9	47.4	36.5	20.4	1.9	12.2	6.3
Food, drink, tobacco	43.0	3.3	19.7	20.0	41.3	2.6	19.0	19.8	0.1	—	—	0.1	1.6	0.7	0.7	0.2
Chemical and allied products: Total	214.4	117.4		97.0	207.5	112.6		94.9	4.7	—	2.9	1.8	2.2	0.5	1.3	0.4
Petroleum products	14.9	5.5		9.4	14.9	5.5		9.4	—	—	—	—	—	—	—	—
Pharmaceutical products	67.3	4.6	37.3	25.4	67.3	4.6	37.3	25.4	—	—	—	—	—	—	—	—
Paint	7.0	0.2	2.1	4.7	6.7	0.1	1.9	4.7	—	—	—	—	0.3	0.1	0.2	0.1
Synthetic resins and plastic materials	23.8	1.8	10.4	11.6	22.8	1.8	9.5	11.4	0.1	—	—	0.1	1.0	—	0.9	0.1
Other chemicals	101.4	6.9	48.6	45.9	95.9	6.5	45.5	43.9	4.6	—	2.9	1.7	0.9	0.4	0.3	0.2
Iron and steel	21.8	14.8		6.9	3.3	0.5		2.8	17.6	—	13.6	4.0	0.9	—	0.7	0.2
Non-ferrous metals	7.5	0.6	3.2	3.6	6.0	0.5	2.7	2.9	0.3	—	0.2	0.1	1.2	0.1	0.4	0.7
Mechanical engineering: Total	87.7	31.2		56.5	59.5	11.5		48.0	26.1	0.6	17.9	7.5	2.1	—	1.1	1.0
Metal working machine tools	5.1	—	1.2	3.9	3.9	—	0.6	3.2	—	—	—	—	1.2	—	0.6	0.6
Textile machinery	3.4	0.6		2.8	3.3	0.5		2.8	—	—	—	—	0.2	—	0.1	0.1
Mechanical handling and contractors' plant	7.1	—	0.8	6.3	5.2	—	0.4	4.8	1.8	—	0.4	1.5	—	—	—	—
Industrial plant and steelwork	23.8	0.6	16.4	6.8	7.0	—	1.8	5.2	16.2	0.6	14.3	1.3	0.6	—	0.3	0.3
Other machinery and equipment	48.3	0.4	11.2	36.7	40.1	0.4	7.7	32.0	8.0	—	3.3	4.7	0.2	—	0.2	—
Scientific instruments and systems	24.5	0.8	6.7	17.0	20.2	0.7	4.4	15.1	3.4	0.1	1.8	1.6	0.9	—	0.6	0.3
Electrical engineering Total	331.9	56.3		275.6	298.6	44.3		254.3	31.4	0.2	10.6	20.6	1.9	0.2	1.0	0.7
Electronic computers	46.7	0.1	1.6	45.1	46.1	0.1	1.5	44.6	0.4	—	—	0.3	0.2	—	0.1	0.2
Electronic components and apparatus including telecommunications	217.5	2.7	33.7	181.2	191.5	2.6	26.8	162.0	25.8	0.1	6.7	19.0	0.2	—	0.1	0.1
Electrical machinery	31.6	0.3	5.7	25.6	26.9	—	2.4	24.4	3.4	0.1	2.6	0.8	1.3	0.2	0.7	0.4
Insulated wires and cables	10.1	0.1	4.5	5.6	8.3	—	3.2	5.1	1.7	—	1.2	0.4	0.2	—	0.1	0.1
Domestic appliances	6.3	—	0.7	5.6	6.1	—	0.6	5.5	0.1	—	—	0.1	—	—	—	—
Miscellaneous electrical goods	19.7	7.0		12.6	19.7	7.0		12.6	—	—	—	—	—	—	—	—
Ships and marine engines	15.7	0.6	6.5	8.6	13.7	0.6	4.6	8.4	—	—	—	—	2.0	—	1.8	0.2
Motor vehicles	84.4	15.4		69.0	83.1	14.4		68.7	—	—	—	—	1.3	—	1.0	0.3
Aerospace (including air cushion vehicles)	281.7	4.7	21.8	255.2	281.7	4.7	21.8	255.1	—	—	—	—	—	—	—	—
Metal goods not elsewhere specified	10.2	0.1	3.6	6.5	9.0	0.1	2.9	6.0	0.9	—	0.4	0.5	0.3	—	0.2	—
Textiles and man-made fibres	24.1	1.2	5.3	17.6	22.5	1.1	4.4	17.0	—	—	—	—	1.6	0.1	0.9	0.6
Leather, leather goods, fur, clothing and footwear	1.6	—	0.2	1.4	0.7	—	0.1	0.6	—	—	—	—	0.9	—	0.1	0.8
Building materials and abrasives	6.2	0.2	2.4	3.6	5.8	0.2	2.1	3.5	0.1	—	—	0.1	0.3	—	0.2	—
Pottery, china and glass	9.5	4.6		4.9	9.0	4.1		4.8	—	—	—	—	0.5	—	0.5	—
Timber and furniture	1.4	0.3		1.1	0.6	0.1		0.5	—	—	—	—	0.8	—	0.2	0.6
Paper, paper products and publishing	7.4	0.4	1.9	5.0	6.7	0.4	1.3	4.9	0.1	—	—	0.1	0.7	—	0.6	0.1
Rubber and rubber goods	8.8	0.3	3.8	4.7	7.8	0.2	3.2	4.4	—	—	—	—	1.0	0.1	0.6	0.3
Other manufactures	8.1	0.4	2.1	5.6	7.7	0.4	1.9	5.5	0.1	—	—	0.1	0.2	—	0.2	—
Construction (2)	5.7	0.4	2.8	2.6	2.0	0.2	0.7	1.1	0.3	—	0.2	0.1	3.5	0.2	1.9	1.4
Utilities and services (3)	32.1	0.4	14.4	17.2	5.0	0.1	1.0	3.8	22.7	0.1	10.4	12.2	4.4	0.2	3.1	1.2

(1) Mining and quarrying products, petroleum and natural gas exploration and extraction.
(2) The figures for this product group do not include the sums for the appreciable development work undertaken on sites: particularly work undertaken in civil engineering.
(3) Gas, electricity, water, railways, road, sea and air transport systems, industrial health and safety, etc.

New companies registered in Northern Ireland

New registrations during January, February, March and April

	Jan 1977	Jan 1976	Feb 1977	Feb 1976	Mar 1977	Mar 1976	Apr 1977	Apr 1976	Total Jan to Apr 1977
Public companies limited by shares	—	—	—	1	—	—	—	1	—
Private companies limited by shares	53	44	68	53	88	49	68	38	277
Private unlimited companies	—	—	—	—	—	—	—	—	—
Public companies limited by guarantee not having a share capital	—	—	2	—	—	—	3	2	5
Private companies limited by guarantee not having a share capital	1	—	—	—	—	1	—	—	1
Private companies limited by guarantee having a share capital	—	—	—	—	—	—	—	—	—
Total nominal capital of companies incorporated	£2,238,600	£1,096,050	£2,673,004	£795,000	£4,453,800	£1,777,200	£1,895,500	£2,002,450	£11,260,904

Selective assistance under section 8 of the Industry Act 1972

Sectoral assistance

The following table shows offers of sectoral assistance amounting to £5,000 or more against which first payments to the companies concerned were made in the period from 1 January to 31 March 1977.

Ferrous foundry industry scheme

Area and company	Amount of assistance committed (£)
Scotland	
George Henderson Ltd	27,620
Cruikshank and Co Ltd	25,425
Lion Foundry Co Ltd	181,000
A. F. Craig and Co Ltd	19,615
Forth Alloys Ltd	95,600
Yorkshire and Humberside	
Davy Roll Co Ltd	180,490
OH Steel Foundries Ltd	188,310
Mech Cast Ltd	105,375
William Lee Malleable Ltd	30,000
North West	
Simon Warman Ltd	161,500
Widnes Foundry and Eng Co Ltd	31,250
East and West Midlands	
Rudge Littley Ltd	28,000
Hillsyde Foundry Ltd	15,875
Serck Audco Valves Ltd	73,350
Coneygre Foundry Ltd	88,750
Birco Motor Cylinder Co Ltd	43,500
Parkray Ltd	357,000
Henley Foundries Ltd	232,500
Triplex Foundry Ltd	537,100
A and N Foundries Ltd	23,670
Brockhouse Hunt Ltd	109,025
Deeley's (Castings) Ltd	16,000
GEC Foundries Ltd (Hill Top Foundry)	393,250
Eastern	
R Hunt and Co Ltd	87,250
Hemel Hempstead Eng Co Ltd	402,075
Lake and Elliot Founders and Engs Ltd	821,900
London and South East	
Barnard and Sons Ltd	50,200
South West	
Willeys of Exeter Ltd	46,525

Machine tool industry scheme

Area and company	Amount of assistance committed (£)
Yorkshire and Humberside	
Staveley Machine Tools Co Ltd	234,750
EDDD Engineering Co	14,141
North West	
Staveley Machine Tools Co Ltd	190,000
East Midlands	
Adcock Shipley Division of Textron Ltd	495,760
West Midlands	
Bronx Engineering Co Ltd	26,529
Target Engineering Ltd	12,300
London and South East	
Staveley Machine Tools Co Ltd	209,000
EMI-MEC Ltd	39,100
Eastern Region	
Staveley Machine Tools Co Ltd	98,000
South West	
Westbrick Engineering	71,450

Clothing industry scheme

Area and company	Amount of assistance committed (£)
Scotland	
Glen Alva Ltd	7,599
Wales	
Hodges Menswear Ltd	21,798
Yorkshire and Humberside	
S. R. Gent and Co Ltd	95,142
North West	
Cookson and Clegg Ltd	13,716
I. and M. Kindler Ltd	21,123
B. Forster and Co Ltd	23,328
Jacob E. Goodman and Sons Ltd	17,375
South West	
Southcombe Bros Ltd	7,822
Covering more than one region	
Burton Group	61,940

Poultrymeat processing industry scheme

Area and company	Amount of assistance committed (£)
East Midlands	
Walter Hermanns and Son Ltd*	94,360
South West	
Webb and Webb Ltd*	51,800

* First payments to these companies were made in the period from 1 October to 31 December 1976.

Accelerated projects scheme

The accelerated projects scheme was a selective scheme, announced in the Chancellor's budget speech in April 1975, to promote counter-cyclical industrial investment and modernisation which would not otherwise take place due to the adverse economic climate. The main criteria were that projects should be a net addition to the firm's capital investment programme; that they would be deferred but for government assistance; that they should be commercially sound; and that they should lead to an improvement in the balance of payments.

The table shows offers made since 1 September 1975, against which a first payment was made to the company concerned in the period 1 January 1977 to 31 March 1977.

Area and company	Product/ activity	Type of assistance*	Amount of assistance committed (£)
Yorkshire and Humberside			
Pauls and Whites Ltd	Animal feedstuffs	IRG	52,000
West Midlands			
Accles and Pollock Ltd	Tubes	IRG	350,000
Staffordshire Potteries (Holdings) Ltd	Dinnerware	IRG	177,000
East Midlands			
Ruston Gas Turbines Ltd	Gas turbines	IRG	112,000
Eastern			
Omes Faulkners Ltd	Steel and light alloys processing	L	360,000
London and South East			
Enfield Rolling Mills Ltd	Non-ferrous metals processing	IRG	52,000
Petbow Ltd	Power plant	IRG	750,000
South West			
Watts, Blake, Bearne and Co Ltd	Ball clay/ china clay	IRG	40,448
Scotland			
Borg Warner Ltd	ABS Resins Project	IRG	616,000
Motherwell Bridge Holdings Ltd	Tank manufacture/ metal fabrication	IRG	156,000
Wales			
Aluminium Wire and Cable Company Ltd	Power cables	IRG	187,000

* IRG – Interest relief grant. L – Loan.

New companies registered in May

Below are details of new companies registered in Great Britain during May 1977 showing nominal capital. The figures are exclusive of unlimited companies and companies limited by guarantee.

Companies registered in May 1977

Nominal capital	Total	Public companies	Public companies
Not exceeding £100	2,693	—	2,693
Over £100 but under £1,000	44	—	44
£1,000 but under £10,000	844	—	844
£10,000 but under £50,000	379	—	379
£50,000 but under £100,000	63	—	63
£100,000 but under £1,000,000	69	—	69
£1,00,000 and over	5	—	5
Total number	4 097	—	4 097
	£ thous.	£ thous.	£ thous.
Total amount of nominal capital	27,086	—	27,086

Companies registered in 1976 and 1977

	1976		1977	
	Number	Nominal capital £ thous.	Number	Nominal capital £ thous.
January	3 476	21,780	3 225	30,825
February	4 088	19,228	4 330	34,505
March	6 190	41,680	5 843	49,266
April	4 150	22,354	5 499	41,860
May	4 343	25,095	4 097	27,086
June	5 624	25,815		
July	4 954	58,659		
August	4 221	44,690		
September	4 377	25,342		
October	4 600	34,544		
November	4 667	60,549		
December	4 655	147,053		
Total	55 345	526,789		

Retailers' stocks in April

TABLE 1 Level of retailers' stocks

Index numbers (end 1971 = 100) *and percentage increase on a year earlier* — At cost at end of month

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
All book values												
1971	89	91	94	95	95	97	95	95	98	106	110	100
1972	96	99	101	102	102	105	102	102	104	113	119	106
1973	103	107	112	112	112	117	116	118	123	134	143	132
1974	128	129	135	139	144	145	144	143	149	161	171	154
1975	148	151	158	154	159	161	160	160	170	187	201	181
1976	172	174	184	185	184	184	180	181	193	215	230	207
1977	199	203	223	227								
1972	8	8	8	7	8	8	7	8	7	7	8	6
1973	8	8	10	—	—	—	—	—	—	—	—	—
1974	—	—	—	24	28	24	24	21	21	20	19	17
1975	15	17	17	11	11	11	11	12	15	16	18	18
1976	16	15	17	20	16	14	13	13	14	15	14	14
1977	16	17	21	23								
At constant (1970) prices												
1971	94	96	98	98	97	99	96	96	98	106	111	100
1972	95	97	100	100	100	102	99	99	101	108	114	101
1973	98	101	105	110	114	117	115	115	119	127	135	123
1974	118	117	120	121	122	121	119	117	119	126	132	117
1975	110	109	113	108	109	110	107	106	112	122	129	115
1976	108	109	114	113	112	112	108	108	113	124	130	115
1977	109	109	118	119								
1972	1	2	2	2	3	4	3	4	2	2	3	1
1973	3	4	5	10	13	15	16	16	18	18	19	22
1974	21	16	14	9	8	3	3	1	−1	−1	−2	−5
1975	−7	−6	−6	−11	−11	−10	−10	−9	−6	−4	−2	−1
1976	−1	−1	1	5	2	2	1	1	2	2	1	—
1977	1	—	3	4								

TABLE 2 Value of physical increase of retailers' stocks at 1970 prices

Seasonally adjusted — £ million

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1971	−11	3	−8	2	−12	17	−7	16	5	24	−14	7
1972	−7	9	−1	13	6	21	−16	25	−22	9	−6	−16
1973	34	25	23	106	57	42	15	21	12	3	11	33
1974	12	−50	—	33	25	−39	10	−24	−25	−4	−19	−30
1975	−19	−30	11	−76	20	−10	5	−6	39	41	15	−13
1976	−24	−10	46	−5	−25	−25	−14	5	31	52	−2	−28
1977	−7	−22	109	19								

Based on the non-seasonally adjusted data of table 1, the level of stocks at book value in April was 23 per cent higher than a year earlier; at constant prices the rise was 4 per cent.

The estimate of the value of the physical increase in retailers' stocks at 1970 prices and seasonally adjusted suggests an increase of £19 million in April following the large increase in March. The seasonally adjusted volume of retail sales fell in each of the first three months of 1977 but changed little in April.

Notes

The book value of retailers' stocks in the United Kingdom at end of December 1971 was £1,886 million.

With the introduction of VAT, the book values are being valued exclusive of this tax. There is, therefore, a discontinuity in the series in 1973 between March and April. For the year up to March, 1974, the usual comparisons with a year earlier for the book value series have not been given. From April, 1974, the basis of valuation is comparable with that of a year earlier and the percentages changes have been re-introduced. The estimates at constant prices take account of this method of valuation, and are on a consistent basis throughout.

For the estimates at constant prices, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the value series to constant prices become more acute. Thus, the relative accuracy with which constant price changes have been measured is likely to have been reduced in recent periods.

The statistics given in table 2 were introduced in an article in the issue of 28 March 1975.

Long-run series back to 1966 for both table 1 and table 2 were included in the article in the issue of 17 September 1976.

Inquiries: 01-215 3220.

Index of retail prices for May

The index of retail prices for all items for 17 May 1977 was 181.7 (15 January 1974 = 100). This represents an increase of 0.8 per cent on April 1977 (180.3) and of 17.1 per cent on May 1976 (155.2).

The rise in the index in May was due mainly to increases in domestic fuel and motoring costs and to increases in the prices of alcoholic drinks, tea and other foods. These increases were partly offset by a reduction in the level of mortgage interest payments and by decreases in the prices of butter and some vegetables.

The movements for the main groups of the index are shown in Table 2.

TABLE 1 Index of retail prices

	All items				All items except seasonal foods		
	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months	12 months	Index 15 Jan 1974 = 100	Percentage change over 1 month	6 months
1976							
December	168.0	+1.3	+7.7	+15.1	166.8	+1.2	+7.3
1977							
January	172.4	+2.6	+10.3	+16.6	170.9	+2.5	+9.0
February	174.1	+1.0	+9.8	+16.2	172.5	+0.9	+8.8
March	175.8	+1.0	+9.5	+16.7	174.3	+1.0	+8.9
April	180.3	+2.6	+10.3	+17.5	178.7	+2.5	+9.8
May	181.7	+0.8	+9.6	+17.1	180.5	+1.0	+9.5

TABLE 2 Index of retail prices: commodity breakdowns

	Indices (15 January 1974 = 100)		Percentage change over the month
	19 April 1977	17 May 1977	
All items	180.3	181.7	+0.8
All items excluding food	177.6	179.3	+1.0
Food	189.6	189.9	+0.2
Seasonal food	223.9	213.7	−4.6
Other food	183.2	185.4	+1.2
Alcoholic drink	181.2	183.9	+1.5
Tobacco	206.5	206.5	+0.0
Housing	166.3	164.3	−1.2
Fuel and light	202.9	210.4	+3.7
Durable household goods	163.7	165.2	+0.9
Clothing and footwear	153.8	154.6	+0.5
Transport and vehicles	189.1	192.2	+1.6
Miscellaneous goods	185.9	187.2	+0.7
Services	170.0	171.9	+1.1
Meals out	178.8	182.0	+1.8

Footwear industry: orders, deliveries and stocks

In the three months ended March 1977 deliveries were estimated to be 7 per cent lower, on a seasonally adjusted pairage basis, than in the three months ended December 1976. Net new orders were 11 per cent lower than in the previous three months, while at the end of March orders on hand were 19 per cent up on the December 1976 level. The index of output in the three months ended March 1977 was 2 per cent lower than in the three months ended December 1976.

A detailed breakdown of manufacturers' deliveries by type of footwear in pairage and value terms, together with figures of exports, imports, consumers' expenditure, prices and employment is published in the Business Monitor Production series under the reference PQ 450.

The index of output is calculated from the value of total sales and work done by firms classified to the footwear industry (Minimum List Heading 450 of the Standard Industrial Classification). In using the index numbers it should be borne in mind that when price increases are large, the various problems associated with constructing a constant price value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent years.

The data on pairage and value relate to complete footwear only sold by manufacturers classified to MLH 450 and to other industries (eg rubber) in the SIC, employing 25 or more persons.

Inquiries: 01-212 6787.

Index of output: Orders on hand, net new orders, deliveries and stocks of complete footwear

Monthly averages or monthly totals

	Index of output 1970 = 100	Orders on hand (end period)		Net new orders			Deliveries			Stocks (end period)
		Million pairs	£ million	Million pairs		£ million	Million pairs		£ million	Million pairs
1966		33.6					16.4			
1967		37.8		16.5			16.1			
1968	113	41.6		17.3			17.0			
1969	108	34.6		15.9			16.5			
1970	100	38.9		16.6			16.2			
1971	108	32.5	55.7	15.7			16.2		23.8	19.4
1972	104	29.5	59.6	15.2		24.8	15.4		24.5	18.5
1973	108	46.2	85.2	17.1		30.5	15.7		28.4	16.5
1974	107	44.3	79.5	14.3		30.9	14.4		31.3	18.0
1975	101	38.8	91.8	13.2		36.2	13.7		35.1	15.8
1976 p	101	47.1	133.0	13.8		42.8	13.1		39.4	14.4
	Seasonally adjusted	Actual	Actual	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual
1975 1st quarter	106	36.2	63.2	11.9	11.0	31.3	14.6	14.6	36.7	18.3
2nd quarter	95	41.2	82.4	14.0	13.4	36.8	12.3	13.1	30.4	23.1
3rd quarter	101	33.1	70.0	11.4	13.9	33.1	14.1	13.8	37.2	17.4
4th quarter	101	38.8	91.8	15.5	14.6	43.4	13.6	13.4	36.1	15.8
1976 1st quarter	101	42.6	89.2	14.6	13.1	38.9	13.3	12.9	39.8	19.0
2nd quarter	99	46.3	107.5	12.8	12.8	40.4	11.5	12.4	34.3	20.9
3rd quarter	100	36.9	89.7	10.0	12.0	34.7	13.2	12.8	40.7	17.2
4th quarter p	105	47.1	133.0	17.8	17.1	57.3	14.4	14.2	42.9	14.4
1977 1st quarter p	103	56.2	137.8	16.5	15.1	49.5	13.5	13.2	47.9	14.7
1976 January	105	38.9	88.2	13.2	13.4	33.9	13.1	13.8	37.6	
February	104	40.0	89.3	14.1	13.2	40.3	12.9	12.8	39.2	
March	94	42.6	89.2	16.5	12.8	42.5	13.9	12.1	42.6	
April	95	43.2	94.4	12.2	9.7	39.7	11.6	12.0	34.5	
May	103	48.0	108.4	15.9	15.4	47.0	11.1	13.1	33.0	
June	100	46.3	107.5	10.2	13.4	34.4	11.8	12.2	35.3	
July	94	40.8	90.7	6.3	10.3	20.2	11.8	12.2	37.0	
August	97	38.1	87.9	8.8	11.4	33.7	11.4	12.0	36.6	
September	105	36.9	89.7	15.1	14.2	50.3	16.2	14.1	48.5	
October p	103	45.2	111.8	24.0	19.3	67.8	15.7	14.3	45.8	
November p	101	46.2	126.1	15.7	12.7	59.2	14.7	13.1	44.9	
December p	111	47.1	133.0	13.6	19.2	45.1	12.7	15.2	38.2	
1977 January p	101	50.6	130.9	15.0	16.0	38.7	11.6	12.8	40.9	
February p	107	52.9	133.9	16.0	15.0	51.4	13.6	13.4	48.4	
March p	100	56.2	137.8	18.6	14.4	58.4	15.3	13.3*	54.5	

p = Provisional.

* Based on early returns, seasonally adjusted deliveries in April are estimated to be 12½ million pairs.

Release dates of economic statistics to be published in July

Information in the table below is issued by the Central Statistical Office on behalf of the Government Statistical Service and other organisations as a guide to the dates of publication of major economic series in July. The dates are those which departments, or other organisations concerned, are aiming at, and would normally expect to meet.

Information about the second half of July will be published next week.

	Method of release	Source
JULY		
4 Mon		
CBI Monthly Trends Inquiry (June)	PN	CBI
Hire purchase and other instalment credit business (May)	PN	Department of Trade
Retail sales (May – final)	PN	Department of Trade
Capital issues and redemptions (during the month of June)	PN	Bank of England
UK official reserves (June)	PN	HM Treasury
5 Tues		
Housing starts and completions (May)	PN	Department of the Environment
House renovation grants approved (May)	PN	Department of the Environment
6 Wed		
London clearing banks' monthly statement (mid-June)	PN	CLCB
UK banks' eligible liabilities, reserve assets, reserve ratios and special deposits (mid-June)	PN	Bank of England
8 Fri		
Personal income, expenditure and saving (1st qtr.); gross domestic product (1st qtr – rev)	PN	CSO
11 Mon		
Central government financial transactions (including borrowing requirement) (June)	PN	HM Treasury
Wholesale price index numbers (June – prov)	PN	Department of Industry
Appropriation account of industrial and commercial companies (1st qtr)	PN	CSO
12 Tues		
Provisional figures of vehicle production (June)	PN	Department of Industry
13 Wed		
Building societies receipts and loans (June)	PN	BSA

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Engineering sales and orders up to March

SIC orders VII, VIII and IX

Provisional trend estimates and seasonally adjusted volume index numbers of engineering sales and orders up to March indicate a continuing slight rise in new orders and sales. This improvement occurred entirely in the home market, and was offset by some decline in the relatively high level of export demand. Export order books continued to lengthen, whilst home order books appear to be levelling out following a decline of more than two years. Total orders-on-hand consequently showed some signs of moving upwards.

The trend of new home orders continued to improve although the increase slackened somewhat in March. The rise during the first quarter of 1977 was 4 per cent. The trend of home sales increased by 2 per cent over the same period, and now seems to be reflecting the earlier upturn in new orders. During the first quarter the inflow of new orders approached the level of sales, stabilising the level of home order books as measured by the seasonally adjusted figures; however this was not sufficient to reverse the trend which showed a continuing slight decline.

In contrast, the trend of export new orders and sales fell during the first quarter. However, the receipt of new orders remained healthy as the fall of 4 per cent was from a high level, and the decline in sales was only 1 per cent. As new orders continued higher than sales, the trend of export orders-on-hand rose by a further 3 per cent between December and March.

As a result of the differing movements in home and export markets, total new orders and sales increased by 1 per cent, and total order books lengthened by ½ per cent during the first quarter of 1977.

The revised figures published in this table are based on the Monthly Engineering Inquiry relating to March 1977. The response rate of 85 per cent to the inquiry for March is judged sufficient to justify publication of provisional indices for this month. Taking into account late returns now received for December 1976, January and February 1977 response rates for these months were 92, 91 and 92 per cent respectively.

When using the volume index numbers and trends shown in the accompanying table, it should be borne in mind that, when price increases are large, the various problems associated with revaluation of the values of engineering sales and orders to constant prices become more acute. Because of these difficulties the relative accuracy of the volume estimates is likely to have been reduced in recent months and studies are currently in hand to ascertain the possible directions and magnitudes of any biases, which may lead to revisions in due course.

An expanded commentary, together with additional tables, is given in Business Monitor PM 33-36, Engineering (volume indices of sales and orders), obtainable from HMSO, PO Box 569, London SE1 9NH, post free for a subscription of £2.22 per annum. Separate commentaries and volume indices are given for sales, orders-on-hand and net new orders for total, home and export markets, for mechanical, instrument and electrical engineering (SIC orders VII, VIII and IX respectively).

Wholesale textile houses: sales and stocks in March

Sales by wholesale textile houses in March showed an increase of 7 per cent on a year earlier, compared with a decrease of 1 per cent in January and an increase of 8 per cent in February.

The value of stocks at the end of March showed an increase of 7 per cent compared with the same period last year.

TABLE 1 Textiles: wholesale sales and stocks

Index numbers and *percentage increase compared with a year earlier* 1950 = 100

		Value of home sales		Value of stocks end period	
1966		110	*–3*	..	..
1967		104	*–5*	..	..
1968		108	*4*	..	..
1969		103	*–5*	..	..
1970		107	*4*	..	..
1971		115	*8*	..	..
1972		121	*5*	..	..
1973		134	*11*	..	..
1974		147	*9*	..	..
1975		147	*1*	..	..
1976		146	*–1*	..	..
1974	1st quarter	134	*12*	189	*3*
	2nd quarter	131	*7*	202	*18*
	3rd quarter	148	*13*	194	*12*
	4th quarter	173	*6*	198	*–3*
1975	1st quarter	143	*7*	219	*16*
	2nd quarter	135	*3*	197	*–2*
	3rd quarter	146	*–1*	193	*–1*
	4th quarter	165	*–5*	224	*13*
1976	1st quarter	133	*–8*	234	*7*
	2nd quarter	127	*–6*	212	*8*
	3rd quarter	149	*2*	204	*6*
	4th quarter	176	*8*	228	*2*
1977	1st quarter	140	*5*	252	*7*
1976	March	174	*–1*	234	*7*
	April	136	*–9*	208	*7*
	May	128	*—*	217	*2*
	June	119	*–9*	212	*8*
	July	115	*–8*	221	*6*
	August	137	*9*	216	*5*
	September	194	*4*	204	*6*
	October	184	*–4*	208	*6*
	November	169	*–13*	229	*–1*
	December	175	*15*	228	*2*
1977	January	85	*–1*	221	*4*
	February	148	*8*	248	*9*
	March	196	*7*	252	*7*

Inquiries

These statistics are prepared by Textile Distributors' Association. Inquiries should be addressed to the Secretary, Textile Distributors' Association, 3 Berners Street, London W1P 4JP (01-580 2902).

TABLE 2 Analysis by department

Percentage increase compared with a year earlier

	Sales		Stocks†
	Mar 1977	Jan-Mar 1977	Mar 1977
Women's knitted outerwear, blouses and skirts	9	8	9
Women's coats, costumes, furs and raincoats	–9	–17	9
Women's underwear	9	14	2
Women's hose and children's socks	15	16	4
Women's millinery	–20	–13	'1
Haberdashery, ribbons and wool	21	17	24
Children's wear	9	6	30
Men's and boys' shirts, pyjamas and outfitting	–7	5	–13
Gloves	–10	5	33
Pierce-goods and nets	–2	–3	62
Household textiles	28	14	28
Floor coverings, furniture and hardware	4	1	3
Boots and shoes	30	31	2
Total‡	7	5	7

† Including some items not included among the subheadings.
‡ Values at cost.

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Index numbers for the combined engineering industries (SIC orders VII, VIII and IX) (a)

Volume index numbers: Orders-on-hand, December 1970 unadjusted = 100 Net new orders and sales, 1970 average monthly sales = 100

	Total			Home			Export		
	Orders-on-hand (end of period)	Net new orders	Sales	Orders-on-hand (end of period)	Net new orders	Sales	Orders-on-hand (end of period)	Net new orders	Sales
Trend estimates									
1975 January	125	92	113	120	91	110	135	95	118
February	122	91	112	117	90	110	132	94	117
March	119	92	111	114	90	109	129	95	117
April	117	92	110	112	90	107	127	97	116
May	115	92	109	109	89	106	125	100	116
June	112	92	108	107	88	104	123	102	115
July	110	91	107	105	86	104	122	103	115
August	108	90	106	102	85	103	120	101	114
September	106	88	105	99	84	102	118	99	113
October	103	87	104	96	83	101	116	96	112
November	101	87	103	94	83	100	114	95	112
December	99	87	103	92	84	99	112	94	112
1976 January	97	88	103	90	86	98	110	94	114
February	95	90	103	89	88	98	108	96	116
March	93	93	104	87	89	99	106	101	117
April	92	95	105	86	90	100	105	106	118
May	91	97	105	84	90	100	104	113	119
June	90	100	105	83	91	100	105	121	118
July	90	103	105	82	92	100	106	128	118
August	90	105	105	81	94	100	108	133	117
September	90	107	105	81	95	100	110	137	117
October	91	108	106	80	97	101	112	137	118
November	91	109	106	79	98	101	114	135	118
December	91	109	106	79	99	102	116	132	118
1977 January	91	109	107	79	101	102	117	130	117
February	92	110	107	78	102	103	118	129	117
March	92	110	107	78	103	104	119	127	116
Percentage change (b) Dec 1976-Mar 1977	+0.5	+1.0	+1.0	−1.5	+4.0	+2.0	+3.0	−4.0	−1.0
Seasonally adjusted									
1969	101	100	97	102	99	99	100	102	91
1970	100	99	100	100	99	100	100	100	100
1971	93	97	101	95	98	101	89	93	102
1972	99	103	101	103	108	105	90	91	92
1973	133	134	113	134	136	117	131	131	102
1974	128	109	111	123	105	111	139	118	113
1975	99	90	108	91	87	105	113	98	115
1976	91	100	105	78	92	100	117	119	117
1975 1st quarter	119	89	112	114	89	110	128	89	118
2nd quarter	113	95	109	108	92	106	124	102	115
3rd quarter	106	90	107	100	86	103	118	101	114
4th quarter	99	85	103	91	80	100	113	98	112
1976 1st quarter	94	92	103	88	90	98	106	96	116
2nd quarter	90	95	106	83	90	101	103	107	119
3rd quarter	90	107	106	81	96	101	109	133	118
4th quarter	91	106	105	78	92	99	117	141	118
1977 1st quarter	92	112	108	78	106	104	120	127	117
1975 January	124	86	114	119	85	112	135	88	119
February	122	97	113	117	98	111	132	95	118
March	119	85	110	114	85	108	128	85	117
April	116	94	112	111	94	111	126	95	115
May	115	100	107	110	94	104	126	114	115
June	113	90	106	108	86	103	124	98	115
July	109	84	109	104	77	105	121	99	120
August	108	93	102	102	84	99	121	115	110
September	106	94	109	100	96	107	118	88	113
October	103	84	107	96	79	104	116	96	112
November	101	85	103	94	83	98	113	89	114
December	99	87	100	91	77	96	113	110	110
1976 January	96	84	102	89	84	98	109	82	114
February	95	95	101	89	94	96	108	97	113
March	94	97	106	88	92	100	106	109	120
April	92	92	108	86	89	103	105	100	120
May	90	94	107	84	89	102	103	104	120
June	90	99	102	83	91	97	103	118	116
July	90	105	104	82	84	97	108	157	120
August	90	103	104	81	95	100	109	122	114
September	90	112	109	81	109	105	109	119	119
October	91	107	105	80	91	100	112	146	117
November	92	113	106	80	98	99	116	149	120
December	91	98	105	78	87	99	117	126	117
1977 January	91	113	107	78	106	104	117	129	117
February	92	112	108	79	112	104	117	113	116
March	92	110	108	78	99	104	120	137	117
Oct-Dec 1976 (av.)	91	106	105	78	92	99	117	141	118
Jan-Mar 1977 (av.)	92	112	108	78	106	104	120	127	117
Percentage change (b)	+1.0	+5.0	+2.5	–	+14.5	+4.5	+2.5	−10.0	1.0

(a) All figures are provisional.

(b) For orders-on-hand, the percentage changes compare the level at the end of the latest period shown with the corresponding level for the earlier period. The percentage changes have been based on the unrounded values and are given to the nearest half percentage point.

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 17 June 1977.

BR indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
Movietone News 2506	BR/E 38867/19/6/82	8	17 June	British Movietonews Ltd	British Movietonews Ltd
			COMMUNITY		
French Mustard	EC 39206/19/6/82	98	16 June	Gala Film Distributors Ltd	Les Filmes Christian Fechner and Renn Productions, Paris
			FOREIGN		
Flash And The Firecat	*F 39202*	*84*	*13 June*	*New Realm Distributors Ltd*	*Sebastian International California*
Swamp Bait	F 39203	81	13 June	New Realm Distributors Ltd	Sebastian International California
The Story Of Joanna	F 39204	64	14 June	Cinecenta Film Distributors Ltd	Gerard Damiano, New York
The Car	*F 39205*	*97*	*15 June*	*Cinema International Corporation (UK)*	*Universal Pictures, California*
The Shaggy D.A.	F 39207	92	16 June	Walt Disney Productions Ltd	Walt Disney Production, California
The Streetwalker	F 39208	89	17 June	New Realm Distributors Ltd	Paris Film Productions, Paris

AMENDMENT TO THE REGISTER

The registration number of the film 'Mr Hulot's Holiday' registered on 19 December 1953, has been amended to EC 18559, the maker's name to Cady Films, Discina, Paris and the name of the renter distributing the film in Great Britain to Supreme Film Distributors Ltd.

Cinema admissions and takings in March

During March, counted as a five-week period, the weekly average of admissions to cinemas in Great Britain was 2.19 million and the weekly average of gross box office takings was £1.77 million. The comparable figures for March 1976 were 2.18 million and £1.57 million.

'T & I' index inquiries

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Index to statistics published regularly in 'Trade and Industry'

(a) annually (m) monthly (q) quarterly

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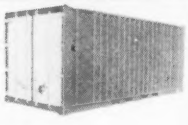

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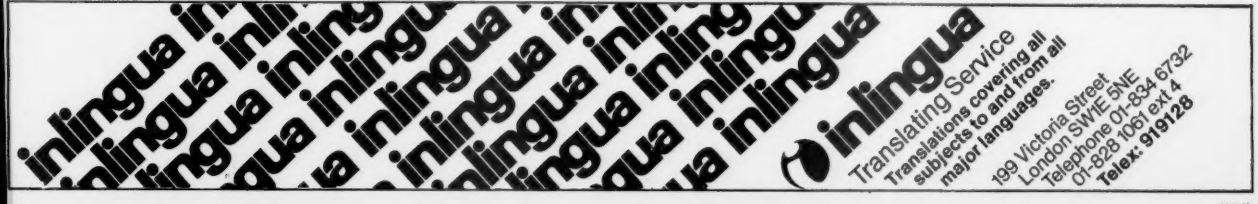

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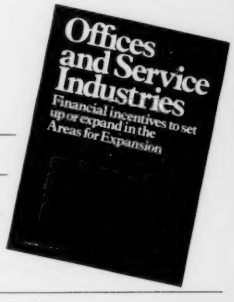

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